

MULTI-TENANT DATACENTER NORTH AMERICAN PROVIDERS 2013

DATACENTER

KEY FINDINGS

- MTDCs remained a strong sector in North America during 2012 and this strong growth has continued during the first three quarters of 2013. Compounded annual growth rate (CAGR) for the North American MTDC sector is forecast by 451 Research at 15.42% for the period from 2011 to 2015.
- M&A activity in the MTDC industry has continued at a steady pace over the past year as providers look to solidify their market position, gain scale by adding capacity and geographic reach, and/or expand their managed services and cloud skills.
- The North American MTDC market remains highly fragmented, with over 300 companies offering MTDC services, providing opportunities for consolidation.
- 451 Research has identified 56 'top-tier' MTDC providers in North America with MTDC revenues of at least \$20m.
- North American datacenter providers have raised over \$9.7bn in new debt so far in 2013, providing evidence of the strong support of lenders for the sector. The funding was largely earmarked for expansion projects, promoting and supporting growth of the industry.
- The Initial Public Offering (IPO) market for the MTDC industry has seen activity in 2013 with both CyrusOne and QTS Realty Trust completing IPOs during the year. If the stock market remains reasonably strong, we would expect to see more firms possibly go the IPO route in the next year with several private equity firms invested in successful North American datacenter providers at over \$100m in revenues potentially looking for an exit.

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REPORT SNAPSHOT

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ABOUT THIS REPORT

The Multi-Tenant Datacenter North American Providers Report 2013 provides the overall size, scope and growth of the multi-tenant datacenter (MTDC) market in North America. It spotlights various prominent North American MTDC providers and provides a market outlook for each.

In this report, 'multi-tenant datacenters' are considered multi-customer colocation and wholesale facilities. Single-user enterprise datacenters and single-tenant datacenters are specifically excluded from this analysis.

The intended audience for this report includes:

- Wholesale datacenter and colocation providers assessing market share and market positions.
- Hosting providers considering datacenter leasing decisions.
- Financial professionals considering investments in datacenter properties and companies.
- Real estate and planning professionals interested in North American MTDC market analysis and provider-by-provider analysis of the MTDC space.

This report was last published in October 2012. 451 Research intends to update this report annually and also publish a second annual report that focuses on the global MTDC markets and providers. We also plan to publish one or two individual country MTDC reports annually looking at a region of the world or individual country MTDC market in more detail.

COMPANIES INCLUDED IN THIS REPORT

21Vianet Group	EarthLink	Sabey Data Centers
365 Main	Equinix	Sago Networks
American Internet Services (AIS)	FiberMedia Group	Savvis
AT&T	FIBERTOWN	Server Farm Realty
Bay Area Internet Solutions	Fortune Data Centers	ServerCentral
Bell Canada	Green House Data	Stream Data Centers
BLACKIRON Data	Hurricane Electric	SunGard Availability Services
C7 Data Centers	Infinity Internet	Switch
Canix	Internap Network Services	T5 Data Centers
CenturyLink	Involta	Tata Communications
Cervalis	IO	TDS Telecommunications
Colo5	Latisys	Telehouse America
Cologix	Level 3 Communications	Telx
ColoSpace	Markley Group	TierPoint
CoreSite	Net2EZ	tw telecom
Cosentry	Net Access Corporation	UnitedLayer
CyrusOne	New York Internet	Vantage Data Centers
Data Centers Canada	NTT America	VAZATA
Data Foundry	Online Tech	Verizon Terremark
DataBank	Peak 10	ViaWest
DataChambers	PEER 1 Hosting	Windstream Hosted Solutions
Datotel	Peerless Network	Xand
Digital Fortress	Phoenix NAP	Xiolink
Digital Realty Trust	Q9 Networks	XO Communications
Directlink Technologies	QTS Realty Trust	zColo
DuPont Fabros Technology	RagingWire Data Centers	
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