

EXECUTIVE OVERVIEW

NORTH AMERICAN MULTI-TENANT DATACENTER SUPPLY

Top 10 Markets – 2012

DATACENTER

KEY FINDINGS

- **Top markets continue to be competitive:** The top five markets in North America continue to be the most competitive, with over 30 providers in each market, on average. Commanding market shares of greater than 25% for the top provider in each market do not start appearing until the second five markets covered in this report.
- **Markets continue to demonstrate a supply/demand imbalance:** Through 2014 most of the top 10 markets in North America are expected to see demand continue to outpace supply.
- **M&A opportunities available:** Given the number of smaller datacenter providers in each market (from a single facility to a handful of facilities), increasing utilization of built capacity, continued lack of access to capital for the smaller datacenter providers to expand, and continued demand in these major markets, several of the smaller companies make attractive acquisition targets for companies looking to expand more quickly than by building.

DECEMBER 2012

REPORT SNAPSHOT

TITLE	North American Multi-Tenant Datacenter Supply: Top 10 Markets – 2012
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ABOUT THIS REPORT

The North American Multi-Tenant Datacenter Supply: Top 10 Markets – 2012 report gives readers an overview of the top 10 datacenter markets in North America, while providing actionable metrics around geographies and specific providers. These geographies include Atlanta, Boston, Chicago, Dallas, Los Angeles, New York/New Jersey, Northern Virginia, Phoenix, San Francisco/Silicon Valley and Seattle. 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:

- Colocation and wholesale datacenter providers assessing market share, market positions and expansion opportunities in emerging major markets.
- Hosting providers considering datacenter leasing decisions and expanding globally.
- Financial professionals considering investments in datacenter properties and companies.
- Real estate and planning professionals interested in emerging major markets analysis.

This report provides current supply, demand and utilization metrics, as well as market-specific analysis similar to our previous supply report series. We size each market by existing supply levels, include maps of datacenter locations and identify all providers as well as identify the top three datacenter providers in each market.

COMPANIES INCLUDED IN THIS REPORT

2020 Live Oak MFC	ByteGrid	CoreXchange
360TCS	Capital Internet	Corporate Colocation
365 Main	Carpathia Hosting	Cousins Properties
Access Northeast	Cervalis	Cyber Development Group International
Adhost	China Telecom	Cyber Wurx
AiNET	China Unicom	CyberTrails
Alchemy Communications	Clearview International	Cyberverse
Alpheus	Clise Properties	CyrusOne
American Internet Services	CME Colocation Services (CME Group)	Dallas Data Center
Amerimar/Newby	CNS Colo	DataBank
ancotel USA	Cogent Communications	Datagram
Another 9	Colo ATL	Datapipe
Aperisys	Colo4	DCI Technology Holdings
Arbinet	ColocateUSA	Digital Capital Partners
ASB Capital Management (INFOMART)	ColocationDallas	Digital Fortress
Ascent	ColoCenters	Digital Realty Trust
AT&T	Cologix	DLS Internet Services
Atjeu Hosting	ColoGuard	Downtown Colo
Atlanta NAP	ColoGuys	DuPont Fabros Technology
Atlantic Metro Communications	ColoSpace	EarthLink
Bay Area Internet Solutions	ColoUnlimited	Enterhost
Best Buy	Continuum Data Centers	Equinix
Bothell Data Services	CoreLink Data Centers	Evocative
BroadRiver	CoreSite	EvoSwitch
	CoreSpace	Excalibur Technology

Expedient Communications	Hqhost.net	NetSource Communications
Experis Data Centers	Hurricane Electric Internet Services	NTT Communications
Facility Gateway Corporation	Integra Telecom	OneNeck
FastServ Networks	Internap Network Services	onShore Networks
FDCServers	InterServer	Open Data Centers
FiberCloud	IO	Optic Fusion
FiberMedia Group	ISOMEDIA	OPUS-3
fifteenfortyseven Critical Systems Realty (1547)	ISWest	Peak 10
First Potomac Realty Trust	IX2 Networks	PEER 1 Hosting
Fisher Plaza	Latisys	Phoenix NAP
Fogo Data Centers	Layer42 Networks	Plus One Data Centers
Fortune Data Centers	Level 3 Communications	Power Loft
Future Hosting	Lighttower Fiber Networks	Primus
GigeNET	Limestone Networks	ProHosting
Global IP Networks	Lincoln Rackhouse	PureGig Holdings
Global Net Access (GNAX)	Markley Group	Quadrant Data Systems
Google	mindSHIFT Technologies	Quality Technology Services
Gotham Bus	Multipoint International	RagingWire
Granite Block Global Data Center	Natcoweb	Sabey Corp
H5 Colo	NationalNet	Sabey Data Centers
HopOne Internet Corp	NaviSite	Saddleback Communications
Hosting.com	NeoSpire	Sago Networks
Hostway Corporation	Net Access Corporation	Savvis/CenturyLink
	Net2EZ	Secured Network Services
	NetRiver	Sentinel Data Centers

Server Farm Realty	TULIX
ServerCentral	tw telecom
ServerPhase	U.S. Colocation Services
Sidera Networks	UnitedLayer
Silicon Valley Colocation	US Signal
Silicon Valley Telecom and Internet Exchange	Vantage
SiteSouth	Vastnet
SMH Colocation	VAZATA
Solutrix	Velocity Networks
Sprocket Networks	ViaWest
Steadfast Networks	Virtustream
Stream Data Centers	Waymark Communications
SunGard	Webair
T5 Data Centers	WebNX Internet Services
Tata Communications	Windstream Communications
TDS	Worknet Inc
Telehouse America	Worldlink Internet Services
Telx	Xand
Terremark/Verizon	Xilogix
The New York Internet Company	XNet Information Systems
Thorn Communications	XO Communications
TierPoint	YourNet Connection
Time Warner Cable	zColo
Tulip Systems	

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