

Australia Data Center - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts (2024 - 2029)

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Abstracts

The Australia Data Center Market size is estimated at 2.67 thousand MW in 2024, and is expected to reach 3.18 thousand MW by 2029, growing at a CAGR of 3.60%. Further, the market is expected to generate colocation revenue of USD 5,654.5 Million in 2024 and is projected to reach USD 7,534.4 Million by 2029, growing at a CAGR of 5.91% during the forecast period (2024-2029).

Tier 3 data center accounted for majority share in terms of volume in 2023, Tier 4 is fastest growing segment

Australia has no Tier 1 & 2 certified facilities. The Tier 3 segment of the Australian data center market reached an IT load capacity of 1,185.7 MW in 2021. It is anticipated to grow from 1,616.26 MW in 2022 to 2,615.6 MW by 2029 while recording a CAGR of 7.12%. The Tier IV data center segment reached an IT load capacity of 123 MW in 2021. The capacity is anticipated to grow from 185 MW in 2022 and reach 517 MW by 2029 while recording a CAGR of 15.81%.

Tier 3 and 4 data centers are expected to showcase significant growth in the Australian data center market. Tier 3 data centers offer uptime of 99.98%, with N+1 redundancies, which makes them preferable for the highest number of businesses. However, providers are getting the Tier 4 certification for their new facilities. For instance, NextDC's data center in Brisbane has become the first in the country to receive a Tier 4 constructed facility certification from Uptime Institute.

Australia Data Center Market Trends

Smartphone penetration rate growing above 130% in the country drives the data center market

The total number of smartphone users in the country was 22.43 million in 2022, and it is expected to witness a CAGR of 1.55% during the forecast period to reach a total number of 24.98 million by 2029.

With 79.60% of the Australian population using smartphones, it's clear that Australians rely significantly on them. Furthermore, 64% of the adult population in Australia utilizes smartphones before going to sleep, further highlighting the country's significant reliance on smartphones. Australia's average mobile phone data usage puts the country in second place in terms of mobile phone usage, following the United States. In 2019, 6.2 million Australians aged 14 and above (32%) owned a prepaid mobile phone, which they recharged every seven weeks on average and 71% of the teenagers spend more than 5 hrs. on social media a day.

Australia has a mobile penetration rate of 130%. On average, there are 104 apps installed on each smartphone device. In 2019, the total value of the Australian mobile commerce market was USD 12.1 billion. This market is expected to increase exponentially in size to over USD 20 billion by 2023. The Australian market's preference for smart phones necessitates the expansion of data centers' capabilities in order to handle the increase in data. Smartphones generate a lot of data, which necessitates real-time processing and analysis. The data centers must manage the sheer amount of data. Thus, the requirement for extra racks in Australia data centers may increase as the number of smartphone users rises.

Increased adoption of streamed gaming and virtual reality would drive the data centers in Australia

The NBN is Australia's national broadband network, and it is replacing copper wires and cable broadband with optical fibers and other technologies to deliver more reliable, high-capacity internet.

The bandwidth and data demand increase is expected to be driven by video streaming in higher resolution formats, such as 4K and 8K television. However, increased adoption of streamed gaming and virtual reality may add to this demand, while compression technology, which reduces data requirements, is expected to partially offset the growth in bandwidth demand.

Fiber lines are expected to remain the dominant fixed broadband technology through 2025, supported by the rising demand for high-speed Internet services and the government's focus on aggressive fiber to the x (FTTx) network expansions nationwide under the National Broadband Network (NBN) project. Telstra was the dominant NBN retail service provider in 2021, with over 3.7 million subscriptions or approximately 45% of total subscribers.

In terms of investment, in August 2022, Australian operator Telstra selected new rollout partners for transport network infrastructure machinery capable of laying dual fiber cables simultaneously. The operator is accelerating its efforts to build out high-capacity data transport networks across Australia, which is renowned for its distinctive environmental challenges.

Australia Data Center Industry Overview

The Australia Data Center Market is fragmented, with the top five companies occupying 16.94%. The major players in this market are Digital Realty Trust Inc., Equinix Inc., Fujitsu Group, Keppel DC REIT Management Pte. Ltd and Telstra Corporation Limited (sorted alphabetically).

Additional Benefits:

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