

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

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Abstracts

The Australia Data Center Physical Security Market size is estimated at USD 81.08 million in 2024, and is expected to reach USD 176.56 million by 2029, growing at a CAGR of 16.84% during the forecast period (2024-2029).

Key Highlights

Security measures can be categorized into computer room controls, facility controls, perimeter security, and cabinet controls. The first layer of data center security detects, delays, and discourages unauthorized personnel entry at the perimeter. Upon breach of the perimeter monitoring, the second layer of defense withholds access. It is an access control system that uses card swipes or biometrics. The third layer further restricts access through diverse verification methods by monitoring all restricted areas and deploying entry restrictions such as turnstile with VCA, biometric access control devices for thumbprints, irises, or vascular patterns, and using radio frequency identification. The initial three layers ensure only authorized entry. However, additional security to restrict access is comprised of cabinet locking mechanisms. It addresses the fear of an 'insider threat,' such as a malicious employee.

The country's IT load capacity is expected to reach over 3,000 MW by 2029, positively impacting the demand for racks between 2024 and 2029.

The construction of a raised floor area for data centers in the country is expected to reach 11.4 million sq. ft by 2029.

The country's total number of racks to be installed is expected to reach over 550,000

units by 2029.

Currently, four submarine cable projects are under construction in the country. One such submarine cable, estimated to start service in 2025, is Asia Connect Cable-1 (ACC-1), stretching over Asia Connect Cable-1 (ACC-1) kilometers with landing points Asia Connect Cable-1 (ACC-1) for planned submarine cables.

Australia Data Center Physical Security Market Trends

The Video Surveillance Segment has a Significant Share in the Market

Sensitive and important data is stored in data centers, so security is a top priority. Data center operators use video surveillance systems to ensure security standards and regulations are met. This allows you to monitor access, detect unauthorized access, and maintain compliance.

Video surveillance helps prevent malicious or erroneous data center operations and provides evidence to identify those responsible in the event of an incident.

Australia's mobile penetration rate is 130%. On average, each smartphone device has 104 apps installed. In 2019, the Australian mobile commerce market was worth 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 smartphones 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. Data centers must manage the sheer amount of data, thereby increasing the demand for video surveillance that can help prevent malicious or erroneous operations within the data center and provide evidence to identify responsible parties when an incident occurs.

The increase in bandwidth and data demand is expected to be driven by video streaming in high-definition formats such as 4K and 8K. However, while the increased adoption of streaming games and virtual reality may contribute to this demand, compression technologies that reduce data requirements are expected to partially offset the increase in bandwidth demand. This increases the size of data centers and the need for video surveillance. This helps prevent malicious or erroneous operations within the data center and provides evidence to identify those responsible in the event of an incident.

Spending on AI systems in Australia is expected to increase to USD 3.6 billion by 2025, with a CAGR of 24.4% between 2020 and 2025. Across industries in Australia, the banking sector is expected to lead the way in AI spending as organizations implement new systems to prevent fraud and improve threat detection and prevention.

The IT and Telecommunication Segment has a Major Share in the Market

The increasing adoption of advanced technologies, such as artificial intelligence, cloud computing, big data, and the Internet of Things, primarily drives ICT spending in Australian data analytics. The widespread use of AI, automation, and big data in various consumer industries is likely to have a significant impact on the Australian ICT market during the forecast period.

The need for public cloud services in Australia continued to grow in 2019, with 42% of businesses in the country reporting the use of cloud computing compared to 31% in 2015-16. Market vendors are rolling out enhanced product offerings curated for IT industry end users, which is also driving growth in this segment.

Currently, Australia has deployed 5G in major cities and is in the process of auctioning off the spectrum to provide more services. This will increase the need for towers. In April 2021, the government allocated a high band 5G spectrum (in the 26 GHz band), which will enable extremely fast, high-capacity services. In the second half of 2021, the government allocated a low band 5G spectrum (in the 850/900 MHz band), which will be crucial for ensuring broader geographic coverage of 5G services. This will enable new applications for 5G in the enterprise market that take advantage of 5G's unique properties like ultra-low latency, high capacity, and advanced functions like network slicing.

Moreover, the Australian government's continued focus on the digital transformation of private and public services will positively drive market growth. Therefore, mobility, cloud computing, data and analytics, and digital storage will see high adoption rates over the next few years. All these factors will create growth opportunities and support the growth of the ICT market in this country. This indicates more consumption of data and thereby an increase in data centers in the country hence, increasing the need for data center security in the country.

The data center construction projects mostly continued as construction is classified as

essential under the current Australian regime. It is a vital sector to keep the country's economy running, thereby increasing the need for data center security in the country.

Australia Data Center Physical Security Industry Overview

The market is highly fragmented due to players like Axis Communications AB, ABB Ltd, and Bosch Sicherheitssysteme GmbH, which play a vital role in upscaling the capabilities of enterprises. Market orientation leads to a highly competitive environment. The biggest retail and wholesale data center market companies have further tried to make their system secure and safe from thefts. There has been a wave of consolidation in the secondary markets as smaller players seek to scale to compete and big players scale their products in the market. For instance,

February 2024: In the latest release of the Axis operating system, AXIS OS, Axis Communications AB announced that more than 200 network devices, including cameras, intercoms, and 11.8 audio speakers, are supported by the IEEE MAC 802.1sec security standard. Demonstrating the company's continued commitment to device and data security, Axis has become the first manufacturer of physical safety products supporting MACsec Media Access Control Security.

August 2023: Securitas signed an expanded 5-year agreement to provide data center security for Microsoft in 31 countries, solidifying a strong relationship. The global agreement includes risk management, comprehensive security technology as a system integrator, specialized safety and security resources, guarding services, and digital interfaces. Securitas ensures that the data center's physical security program remains innovative, robust, and effective. This demonstrates stability as a collaborator, assisting in navigating the challenges of Microsoft's expanding business.

Additional Benefits:

The market estimate (ME) sheet in Excel format

3 months of analyst support

Contents

1 INTRODUCTION

1.1 Study Assumption and Market Definition

1.2 Scope of the Study

2 RESEARCH METHODOLOGY

3 EXECUTIVE SUMMARY

4 MARKET DYNAMICS

4.1 Market Overview

4.2 Market Drivers

4.2.1 Increasing Data Traffic and Need for Secured Connectivity are Promoting the Growth of the Data Center Physical Security Market

4.2.2 Rise in Cyber Threats is Causing the Data Center Physical Security Market to Grow

4.3 Market Restraints

4.3.1 Limited IT Budgets, Availability of Low-Cost Substitutes, and Piracy are Discouraging the Potential Growth of the Data Center Physical Security Market

4.4 Value Chain / Supply Chain Analysis

4.5 Industry Attractiveness - Porter's Five Forces Analysis

4.5.1 Threat of New Entrants

4.5.2 Bargaining Power of Buyers/Consumers

4.5.3 Bargaining Power of Suppliers

4.5.4 Threat of Substitute Products

4.5.5 Intensity of Competitive Rivalry

5 MARKET SEGMENTATION

5.1 By Solution Type

5.1.1 Video Surveillance

5.1.2 Access Control Solutions

5.1.3 Others (Mantraps, Fences, and Monitoring Solutions)

5.2 By Service Type

5.2.1 Consulting Services

5.2.2 Professional Services

5.2.3 Others (System Integration Services)

5.3 End User

5.3.1 IT and Telecommunication

5.3.2 BFSI

5.3.3 Government

5.3.4 Media and Entertainment

5.3.5 Other End Users

6 COMPETITIVE LANDSCAPE

6.1 Company Profiles

6.1.1 Axis Communications AB

6.1.2 ABB Ltd

6.1.3 Bosch Sicherheitssysteme GmbH

6.1.4 Dahua Technology

6.1.5 Honeywell International Inc.

6.1.6 Johnson Controls

6.1.7 Schneider Electric

6.1.8 ASSA ABLOY

6.1.9 Securitas Technology

6.1.10 Cisco Systems Inc.

7 INVESTMENT ANALYSIS

8 MARKET OPPORTUNITIES AND FUTURE TRENDS

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