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

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Abstracts

The Australia Data Center Power Market size is estimated at USD 0.78 billion in 2024, and is expected to reach USD 1.08 billion by 2029, growing at a CAGR of 6.09% during the forecast period (2024-2029).

The increasing demand for cloud computing among SMEs, government regulations for local data security, and growing investment by domestic players are some of the major factors driving the demand for data centers in the country.

Key Highlights

Under Construction IT Load Capacity: The upcoming IT load capacity of the Australian data center market is expected to reach 4,765.19 MW by 2029.

Under Construction Raised Floor Space: The country's construction of raised floor area is expected to increase to 1.42 million sq. ft by 2029.

Planned Racks: The country's total number of racks to be installed is expected to reach 71K units by 2029. Greater Melbourne is expected to house the maximum number of racks by 2029.

Planned Submarine Cables: There are close to 40 submarine cable systems connecting Australia, and many are under construction. One such submarine cable that is estimated to start service in 2025 is Asia Connect Cable-1 (ACC-1), which stretches over 18000 Kilometers with landing points from Darwin.

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The government is considering using power-saving measures such as subsidies to increase energy efficiency or productivity and move toward a low-carbon system to solve the electricity problem and crisis. In support of such policies and to reduce energy consumption, key market players are focusing on introducing efficient power management systems such as PDUs, busways, and UPS for the purpose of controlling unnecessary expenditures in data centers, which is expected to increase market growth.

Australia Data Center Power Market Trends

The IT & Telecom Segment is Expected to Hold a Significant Market Share

Government, BFSI, and manufacturing are the major end-user industries in the Australian data center market, and they are expected to showcase significant growth during the forecast period. Currently, the cloud segment holds a significant market share. About 10-15% of data is created and processed outside a centralized data center or cloud, but the figure is expected to cross 60-70% by 2025. This is a global trend that is also reflected in Australia. The Australian Digital Transformation Agency (DTA) issued a request that most data center companies should be considered for the new whole-of-government data panel. Since July 2023, government agencies have had to use accredited data center providers on the new panel to host sensitive data systems.

In the BFSI segment, since 2019, digital banking has been the primary channel for customers aged between 16 and 69, with digital interactions up by 10% since 2019. According to the Australian Banking Association Inc., the proportion of Australians using digital wallets is expected to increase over the coming years.

According to Austrade, over the next 20 years, Australia's manufacturing industry is expected to evolve into a highly integrated, collaborative, and export-focused ecosystem that provides high-value customized solutions for global value chains. The use of robotics and process automation, powered by AI technologies with machine learning capabilities, is becoming key to manufacturing operations. Such trends are expected to generate significant demand for the Australian data center market.

Monitored PDUs Hold a Significant Share in the Market

Monitored rack PDUs are essential components in data center and server room

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infrastructure, providing real-time monitoring of power usage, voltage, current, and other electrical parameters. This data helps administrators make informed decisions about power allocation and capacity planning.

By tracking power usage trends, administrators can plan for future growth and ensure that power capacity is not exceeded, preventing overloads that could lead to equipment failures. Also, it helps identify inefficiencies and optimize energy usage. This can lead to cost savings and a reduced environmental footprint by eliminating unnecessary power consumption. Also, it allows administrators remote access and control, reducing the need for physical presence and minimizing operational disruptions.

Increasing focus on digitalization, internet penetration, and e-commerce sales across the country creates more need for storage facilities, resulting in huge demand for data centers and a rise in power consumption. The increased demand for data storage has led to the deployment of intelligent power distribution units (PDUs) against simple multi-socket rack installations with server and network equipment, which optimize power consumption in data centers.

Because of the advancements mentioned with monitored PDUs and the necessity to reduce electricity consumption as per government measures in the country, key market players are focusing on introducing efficient power management systems. In May 2023, Eaton, which provides power management services, launched G3 Universal Input Rack PPDUs with dynamic C39 outlets capable of accommodating different plug configurations and input voltage requirements. To meet the most diverse data center rack power requirements, G3UPDU added new features.

In May 2023, Legrand, a significant global provider of electrical and digital building infrastructures, introduced the next generation of intelligent rack PDUs PRO4X and Raritan PX4; these new intelligent rack PDU designs revolutionize capacity planning, environmental monitoring, physical and digital access control, workload optimization, and uptime initiatives. Such developments in the segment are expected to boost regional demand over the forecast period.

Australia Data Center Power Industry Overview

The Australian data center power market is highly concentrated, with the presence of multiple vendors. Players are adopting several strategies, such as mergers and

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acquisitions (M&A), collaborations, partnerships, etc. Various initiatives are being undertaken by governmental bodies as well as private data center construction, creating intense competition. Key players in the market include Schneider Electric SE, ABB Ltd, Rittal GmbH & Co. KG, Fujitsu Limited, and Legrand Group.

December 2023: Eaton, an intelligent power management company, announced the launch of its new Rack PDU G4 (4th generation) that provides a high security and business continuity data center. It also combines with C39 outlets that securely connect both C14 and C20 power cords, backed by a locking mechanism and a built-in high retention system that secures the power cord.

November 2023: ABB Ltd announced the launch of the Protecta Power panel board, designed for industrial, commercial, and institutional buildings. It is integrated with digital monitoring and control technology, enhancing durability and safety.

Additional Benefits:

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