

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

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Abstracts

The Indonesia Data Center Power Market size is estimated at USD 285.70 million in 2024, and is expected to reach USD 625.80 million by 2029, growing at a CAGR of 16.35% 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 Taiwanese data center market is expected to reach 1,205.3 MW by 2029.

Under Construction Raised Floor Space: The country's construction of raised floor area is expected to increase to 4.37 million sq. ft by 2029.

Planned Racks: The country's total number of racks to be installed is expected to reach 80,000 units by 2029. Greater Jakarta is expected to house the maximum number of racks by 2029.

Planned Submarine Cables: There are close to 25 submarine cable systems connecting Indonesia, and many are under construction. One such submarine cable that is estimated to start service in 2024 is Apricot, which stretches over 11,972 km with landing points from Batam and Tanjung Pakis.

The government considers power-saving measures such as subsidies to increase energy efficiency or productivity and moves towards a low-carbon system to solve the electricity problem and crisis. In support of the above policy 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 fuel market growth.

Indonesia Data Center Power Market Trends

IT and Telecom to Register Significant Market Share

In 2023, the large-sized data center segment recorded a major market share of 64%, followed by the massive data center segment with a 29.8% market share. Growing digitization in the country is creating the demand for massive and mega data centers as the existing size is insufficient to cater to the demand. Thus, the construction of mega data centers gained traction in 2022, and it is expected to register a CAGR of 40% by 2029. It is expected to achieve an IT load capacity of 651 MW by 2029.

The massive data center segment is expected to witness significant growth, registering a CAGR of 15.1% and an IT load capacity of 511.3 MW by 2029. Data center operators are opting to construct facilities with maximum capacity or expand existing data centers to full capacity. On the contrary, medium- and small-sized data centers are expected to witness null growth based on the decreasing demand in the market.

Large-sized data centers, which once held a market share of over 70% in 2017, are projected to witness a downward trend during the forecast period, accounting for a market share of 16.5% in 2029. These legacy data centers with older data center infrastructure are becoming unattractive to customers as they are shifting toward more advanced and safe massive and mega data centers.

Monitored PDUs Hold Significant Share in the Market

Monitored rack PDUs are essential components in data center and server room 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. It also 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 for 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 demand for storage facilities, resulting in huge demand for data centers and a rise in power consumption. Growing 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 above 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 the power management service, 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 has added new features.

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 predicted to boost regional demand during the forecast period.

Further, major mega data center projects are under construction, led by PT DCI Indonesia Tbk's H2 Pertiwi Lestari facility, estimated to be a 600 MW facility once completed. Currently, 135 MW of these are under construction and in the first phase.

There are seven active under-construction projects in the country, of which four are in Greater Jakarta. Some major projects include STT Jakarta DC with an installed capacity of 72 MW, Indosat Tbk's CGK5 facility, and AESLER-GREENIX Mark 1 facility by PT Aesler Grup Internasional Tbk and Huawei Digital Power in Bat. Such developments are expected to drive demand for monitored PDUs.

Indonesia Data Center Power Industry Overview

The Indonesian data center power market is highly concentrated, with multiple vendors present. Players are adopting several strategies, such as mergers and acquisitions (M&A), collaborations, and partnerships. Various initiatives are being undertaken by governmental bodies as well as private data center construction, thereby creating intense competition. Key players are Schneider Electric SE, ABB Ltd., Rittal GmbH & Co. KG, Fujitsu Limited, and Legrand Group.

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

August 2023: Legrand announced the launch of a new Starline Series-S Track Busway power distribution system that has an IP54 ingress-protection rating, which indicates that it is splashproof and dust-resistant.

Additional Benefits:

The market estimate (ME) sheet in Excel format

3 months of analyst support

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