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

https://marketpublishers.com/r/N6D3C4B422D8EN.html
Date: July 2024
Pages: 185
Price: US$ 4,750.00 (Single User License)
ID: N6D3C4B422D8EN

Abstracts

The New Zealand Data Center Market size is estimated at 164.8 MW in 2024, and is expected to reach 354.1 MW by 2029, growing at a CAGR of 16.53%. Further, the market is expected to generate colocation revenue of USD 24.8 Million in 2024 and is projected to reach USD 40.1 Million by 2029, growing at a CAGR of 10.07% during the forecast period (2024-2029).

Tier 3 DC facilities dominates the market share in the region, Tier 4 is fastest growing DC market in the region

Tier 1 and Tier 2 facilities are losing demand due to their inability to meet the growing uninterrupted business services. A growing number of global companies are creating business continuity services and are gradually shifting priority to Tier 3 and 4 data centers.

The Tier 3 sector in the New Zealand data center market reached an IT load capacity of 47.03 MW in 2022 and is expected to register a CAGR of 5.63% to reach a capacity of 69.03 MW by 2029. Increased investments in the building affect data center infrastructure and technological advancements. It is expected to create lucrative opportunities for market growth by 2029.

Tier 4 data centers are expected to be the fastest-growing segment, with a CAGR of 31.53%. The segment amounted to just 2 MW in 2022 and is expected to touch 13.62 MW by 2029.

Pandemic-led demand for video conferencing, online schooling, entertainment, social networking, and platforms to support remote working led to a 47% Y-o-Y surge in global internet traffic in 2020, eclipsing initial forecasts of 28%. These services need data center facilities with minimum times and 24/7 support, which Tier 3 and 4 facilities can offer.

Other major demand drivers include global technology services companies catering to growing corporate requirements for remote working and other virtual arrangements. The wider adoption of 5G and further digitalization of healthcare and other government services will be the primary demand drivers of Tier 3 and Tier 4 data center growth within Asia-Pacific.

New Zealand Data Center Market Trends

Surge in internet banking subscribers and digital inclusion in shopping trends boost the market demand

Smartphone connections in the country have been consistently growing over the years by a small margin. Smartphone users are expected to increase from 6.48 million in 2022 to 7.10 million by 2029.

Between January 2020 and January 2021, the number of mobile connections in New Zealand increased by 78 thousand (+1.2%). In January 2021, the number of mobile connections in New Zealand was equivalent to 135.6% of the total population.

The majority of New Zealanders own a smartphone. In 2022, smartphone penetration in the country was expected to be around 92%. In 2021, post-paid mobile phone connections accounted for the country's vast majority of mobile subscriptions. Vodafone, Spark, and 2degrees were the leading mobile phone providers, with a more than 90% combined market share.

High levels of broadband and fiber cable connection along with increase in online gaming and ecommerce purchase shall boost the market demand

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The country officially ended the support for 2G services in 2020 and is expected to stop the services for 3G by the end of 2023.

The country has witnessed increased speeds of 4G and 5G over the years, peaking at 66 Mbps and 431 Mbps by 2029, for 4G and 5G, respectively. Vodafone had the highest average 5G download speed of the operators surveyed, according to data collected in New Zealand between January and March 2022. Vodafone customers using a 5G-enabled device saw an average download speed of 253.8 Mbps.

The country officially launched 5G in 2019 and witnessed an average speed of 159.47 Mbps. New Zealanders require large amounts of data for everyday living, from communicating via social media platforms to purchasing goods online and for entertainment.

New Zealand Data Center Industry Overview

The New Zealand Data Center Market is fragmented, with the top five companies occupying 38.85%. The major players in this market are Canberra Data Centers, Chorus, Plan B Limited, Spark New Zealand Limited and Vocus Group Limited (sorted alphabetically).

Additional Benefits:

The market estimate (ME) sheet in Excel format

3 months of analyst support

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