

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

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Abstracts

The New Zealand Data Center Power Market size is estimated at USD 111.70 million in 2024, and is expected to reach USD 213.60 million by 2029, growing at a CAGR of 14.43% 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 IT load capacity of the data center market in New Zealand may grow steadily and reach 354.2 MW by 2029.

Under Construction Raised Floor Space: The country's total raised floor area is expected to reach 0.8 million sq. ft by 2029.

Planned Racks: The country's total number of installed racks may reach 36,870 units by 2029. Auckland is expected to house the maximum number of racks by 2029.

DC Facilities: The increasing demand for cloud and colocation services in New Zealand has boosted investments by Microsoft, AWS, and other hyper-scale service providers. Auckland is New Zealand's premier data center hub, hosting approximately 50% of the country's data centers.

Leading Market Player: The company operates four data centers in the country, one

each in Auckland, Wellington, Christchurch, and Hamilton. The Kapua facility at Hamilton, the biggest data center, provides colocation services across an IT load capacity of 14 MW on a floor space area of 30,000 sq. ft.

New Zealand Data Center Power Market Trends

The BFSI Segment is Expected to have a Significant Market Share

The media and entertainment segment is expected to hold the highest market share in the data center market, with 21.9% of the market share in 2023 and a projected increase to 22.8% by 2029. The number of active subscribers streaming on Netflix significantly increased from 98.91 thousand in 2017 to 264.83 thousand in 2020. This doubling in just three years suggests the increasing demand for data centers in the media and entertainment segment.

Furthermore, the BFSI (banking, financial services, and insurance) segment is expected to witness the highest growth rate of 6.23% during the forecast period. The segment is projected to hold an IT load of 119.72 MW in 2029. The increasing demand for cashless payments through e-commerce platforms and other service channels will complement the growth in the industry.

The number of credit card transactions doubled from 418.39 million in 2017 to 693.41 million in 2021. Additionally, credit card payments per capita rose from 85 in 2017 to 144.48 in 2023. During the same period, the demand for data processing facilities in the BFSI segment increased from 38.4 MW in 2017 to 68.9 MW in 2023, suggesting a correlation with the increasing cashless transactions.

Monitored PDUs Hold a 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. 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 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 the need for more storage facilities, resulting in huge demand for data centers and a rise in power consumption. Increasing demand for data storage has led to deploying 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, a 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.

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 during the forecast period.

There are no mega data centers in the country. However, the demand for mega data centers may increase in the near future due to the advancement of 5G technology and industrial digitization. Since renewable energy sources provide the majority of the power, businesses may use big data centers to store and analyze data. The majority of the nation's electricity is generated through hydropower, geothermal, solar, and wind energy. For instance, the nation wants to reach net zero emissions of greenhouse gases by 2050 and create 100% renewable energy by 2030.

In addition, the nation has eight undersea cables now in operation, including the one being developed by Hawaiki Undersea Cable, which will link New Zealand to Australia, Indonesia, Singapore, and the United States and is expected to come into service in 2025. These factors are likely to increase the need for data storage, and more data centers will be developed to fulfill the need for data storage.

New Zealand Data Center Power Industry Overview

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

January 2024: Vertiv announced the plans to double its manufacturing capacity for busways, switchgear, and integrated modular solutions (IMS) by 2025. The expansion plans include increasing utilization and footprint in the United Arab Emirates, Ireland, South Carolina (United States), Mexico, Slovakia, and Northern Ireland.

December 2023: Eaton, an intelligent power management company, announced the launch of its new Rack PDU G4 (4th generation), which provides high security and a 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.

Additional Benefits:

The market estimate (ME) sheet in Excel format

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