

Australia Data Center Storage - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts 2019 - 2030

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Report description:

The Australia Data Center Storage Market size is estimated at USD 2.88 billion in 2024, and is expected to reach USD 3.47 billion by 2030, growing at a CAGR of 3.18% during the forecast period (2024-2030).

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. This leads to a growing need for data center storage equipment.

Key Highlights

- Under Construction IT Load Capacity: The upcoming IT load capacity of the South Korean data center market is expected to touch around 2,000 MW by 2029.
- Under Construction Raised Floor Space: The country's construction of raised floor area is expected to increase to 5 million sq. ft by 2029.
- Planned Racks: The country's total number of racks to be installed is expected to reach 270,000 units by 2029. Greater Seoul is expected to house the maximum number of racks by 2029.
- Planned Submarine Cables: There are close to 10 submarine cable systems connecting South Korea, and many are under construction. One such submarine cable that was estimated to start service in 2023 is Southeast Asia-Japan Cable 2 (SJC2), which stretches over 10,500 kilometers with landing points from Geoje, South Korea.
- The IT load capacity in the country is expected to reach over 3,000 MW by 2029, positively impacting the demand for racks during the forecast period.
- 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.

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-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 18,000 kilometers with landing points for planned submarine cables.

Australia Data Center Storage Market Trends

IT and Telecommunication Segment to Hold Major Share in the Market

- Australia's average mobile phone data usage puts the country in second place in terms of mobile phone usage, following the United States. In 2019, 6.2 million Australians aged 14 and above (32%) owned a prepaid mobile phone, which they recharged every seven weeks on average. About 71% of teenagers spend more than 5 hours on social media a day. The Australian market's preference for smartphones necessitates the expansion of the capabilities of data centers to handle the increase in data. As a result, the increase in the number of data centers ensures that more storage devices are required to meet the growing computing needs.
- Australia has a mobile penetration rate of 130%. On average, there are 104 apps installed on each smartphone device. In 2019, the total value of the Australian mobile commerce market was USD 12.1 billion. This market is expected to increase exponentially in size to over USD 20 billion by 2023. Smartphones generate a lot of data, which necessitates real-time processing and analysis. The data centers must manage the sheer amount of data. This necessitates an increase in the number of data centers. Therefore, more storage devices are required to meet the growing computing needs.
- With the growth of data-intensive technologies, cloud computing, and digital services, businesses are generating and processing larger amounts of data. Data centers must scale their storage infrastructure to accommodate this increased workload. This may include adding flash storage and drives to existing data centers or building new data centers. The increase in the number of data centers is directly related to the demand for storage devices in IT infrastructure. As the number of data centers increases, more storage devices are required to meet the growing computing needs.
- Data centers are critical to national security, internet infrastructure, and economic performance. The country is experiencing rapid growth in its data center infrastructure, driven by a growing preference for the cloud and increased consumption and generation of data by increasing digital users. This increases the usage of data centers and, at the same time, increases the usage of storage devices in data centers, positively impacting the market studied.
- The demand for new data centers is skyrocketing, with hyperscale facilities needed by major internet providers such as Amazon Web Services (AWS), Microsoft, Google Cloud, and Alibaba Cloud to power their clouds. This will promote the domestic data center storage market and increase the market revenue.

Hybrid Storage Expected to Hold Significant Share

- Businesses are moving from public cloud to hybrid IT. The companies are growing businesses and providing adequate customer service. The requirement for storing and processing intense data creates the need for hybrid storage. About 10-15% of data is created and processed outside a centralized data center or cloud, but the number is expected to cross 60-70% by 2025, a global trend that is also reflected in Australia. The COVID-19 pandemic highlighted that Australia has a great need for digital infrastructure to improve connectivity in remote and rural areas. This enables the combination of on-premise and cloud storage solutions, known as data center hybrid storage. This approach takes advantage of the best of both environments and provides the flexibility to store and manage data on-premises and in the cloud, thereby increasing market revenue in the country.
- To ensure data integrity and legal compliance, enterprises can use these hybrids to tailor their storage strategies to specific legal requirements. This incorporates the use of hybrid storage for data centers, thereby increasing the need for data storage in

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the country.

- Market vendors are rolling out enhanced product offerings curated for the IT end-user industry. For instance, in March 2021, Cisco announced Cisco Plus Hybrid Cloud, which delivers data center networking, computing, and storage technologies through a flexible consumption model. Initial as-a-service offers will be available as a limited release in Australia, Canada, Germany, the Netherlands, the United Kingdom, and the United States, with flexible payment options and order delivery within 14 days. Such services are expected to increase the deployment of data centers in the region, enabling businesses to grow. Data centers are expanding and adapting to meet the growing connectivity needs of various industries and increasing use of internet. Businesses are increasingly relying on hybrid infrastructure and cloud capabilities as they seek flexibility, scalability, and remote work capabilities. The data traffic is also increasing and, thereby, the need for storage for businesses gains importance. This increases the market value for hybrid storage solutions.
- Several service providers are deploying advanced storage solutions to ensure data availability and access in hybrid clouds. The companies are offering optimized hybrid storage systems. For example, HPE GreenLake, an updated app and data product, introduced platform upgrades and new cloud services in 2022. Therefore, this product portfolio is adopted by large enterprises with large data storage capacities. This demands for increased hybrid storage in the country.

Australia Data Center Storage Industry Overview

The Australian data center storage market is moderately fragmented. The major players in this market hold the majority of the market share. Some significant players are Dell Inc., Hewlett Packard Enterprise, NetApp Inc., Hitachi Vantara LLC, and Kingston Technology Company Inc. These companies leverage strategic collaborative initiatives to increase their market share and increase their profitability.

September 2023: Pure Storage appointed Westcon-Comstor as its newest distributor in Australia. The partnership is an expansion of the two companies' existing agreements in New Zealand, Singapore, Indonesia, Malaysia, China, Hong Kong, and the Philippines. The partnership accelerates the adoption of FlashStack, a software-defined hybrid cloud infrastructure from Pure and Cisco that integrates computation, network, and storage.

June 2023: Hewlett Packard Enterprise expanded its portfolio of SaaS and NaaS products to HPE GreenLake and added HPE SaaS products to AWS Marketplace. The HPE Aruba Networking CX 8000, HPE Aruba Networking 9000, and HPE Aruba Networking 10000 Series data center switching portfolio is now available via Network as a Service (NaaS). The two new HPE GreenLake for Aruba networking service packs allow partners to expand into data center networking and bundle their design and delivery services with a monthly NaaS technology subscription, enabling customers to consume a full compute, storage, and networking data center stack via HPE GreenLake.

Additional Benefits:

- The market estimate (ME) sheet in Excel format
- 3 months of analyst support

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