

Australia Data Center Market - Investment Analysis & Growth Opportunities 2024-2029

Market Report | 2024-05-16 | 152 pages | Arizton Advisory & Intelligence

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Report description:

The Australian data center market is expected to grow at a CAGR of 3.22% from 2023-2029.

KEY HIGHLIGHTS

- Australia has about 135 operational colocation data centers. Most are being developed according to Tier III standards. For instance, NEXTDC's data center, M1 in Melbourne, is built according to Uptime Tier III standards.
- The average cost of building a data center in the country ranges between \$9 to \$10 per watt, an increase of around 4-5% YoY, making it amongst the costliest markets in the APAC region.
- The Australian data center market is also witnessing significant improvements in submarine and inland connectivity. For instance, the Hawaiiki Nui is the longest upcoming cable, spanning over 15,500 miles and connecting Australia with the US, Australia, New Zealand, and other countries.
- The Australian government has set a Power Usage Effectiveness (PUE) target rate of about 1.3 or less for the country's data center facilities, adhering to the ESG goals.
- Significant deployment and adoption of 5G services are also progressing in the country, with telecom operators like Telstra, Vocus, and others expanding their network coverage areas. This leads to increased data traffic and bolsters demand for more data centers in the country.

WHY SHOULD YOU BUY THIS RESEARCH?

- Market size is available regarding investment, area, power capacity, and Australia colocation market revenue.
- An assessment of the data center investment in Australia by colocation, hyperscale, and enterprise operators.
- Investments in the area (square feet) and power capacity (MW) across cities in the country.
- A detailed study of the existing Australia data center market landscape, an in-depth market analysis, and insightful predictions about market size during the forecast period.
- Snapshot of existing and upcoming third-party data center facilities in Australia

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- o Facilities Covered (Existing): 135
- o Facilities Identified (Upcoming): 23
- o Coverage: 20 Locations
- o Existing vs. Upcoming (Area)
- o Existing vs. Upcoming (IT Load Capacity)
- Data Center Colocation Market in the Australia
- o Colocation Market Revenue & Forecast (2023-2029)
- o Retail Colocation Revenue (2023-2029)
- o Retail Colocation Pricing
- The Australia data center market investments are classified into IT, power, cooling, and general construction services with sizing and forecast.
- A comprehensive analysis of the latest trends, growth rate, potential opportunities, growth restraints, and prospects for the industry.
- Business overview and product offerings of prominent IT infrastructure providers, construction contractors, support infrastructure providers, and investors operating in the industry.
- A transparent research methodology and the analysis of the demand and supply aspects of the industry.

VENDOR LANDSCAPE

- In 2023, some of the key colocation investors in the Australian data center market are AirTrunk, Equinix, STACK Infrastructure, NEXTDC, DCI Data Centers, CDC Data Centres, Macquarie Data Centres, and Vantage Data Centers.
- In October 2023, Microsoft, the hyperscale tech giant, announced that they intend to expand their presence in Australia by investing more than USD 3 billion to increase and enhance their computing capacity by over 250% in the next two years. In July 2023, it confirmed plans to construct a new data center facility in Sydney.

- IT Infrastructure Providers

- o Arista Networks
- o Atos
- o Broadcom
- o Cisco Systems
- o Dell Technologies
- o Extreme Networks
- o Hewlett Packard Enterprise
- o Hitachi Vantara
- o IBM
- o Juniper Networks
- o Lenovo
- o Oracle
- o Pure Storage
- o Quanta Cloud Technology
- o Super Micro Computer

- Data Center Construction Contractors & Sub-Contractors

- o AECOM

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- o A W Edwards
- o Aurecon
- o Benmax
- o BGIS
- o Dem
- o FDC Construction & Fitout
- o FKG Group
- o Greenbox Architecture
- o HDR (Hurley Palmer Flatt)
- o Hutchinson Builders
- o Icon
- o ISG
- o John Holland
- o Kapitol Group
- o Linesight
- o Manteena Group
- o Nilsen
- o Paramount Airconditioning
- o Parratech
- o SCEE Group
- o Stowe Australia
- o Taylor Group Construction

- Support Infrastructure Providers

- o ABB
- o Airedale
- o Alfa Laval
- o Canovate
- o Caterpillar
- o Condair
- o Cummins
- o Delta Electronics
- o Eaton
- o Everett Smith & Co
- o Green Revolution Cooling
- o HITEC Power Protection
- o Kohler
- o Legrand
- o Mitsubishi Electric
- o Piller Power Systems
- o Rittal
- o Rolls Royce
- o Schneider Electric
- o STULZ
- o Thycon
- o Vertiv

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-□Data Center Investors

- o□5G Networks
- o□AirTrunk
- o□Amazon Web Services
- o□CDC Data Centres
- o□DC Two
- o□DCI Data Centers
- o□Digital Realty
- o□Equinix
- o□Edge Centres
- o□Fujitsu
- o□Global Switch
- o□Leading Edge Data Centres
- o□Keppel Data Centres
- o□Macquarie Data Centres
- o□Microsoft
- o□NEXTDC
- o□STACK Infrastructure

-□New Entrants

- o□GreenSquareDC
- o□Stockland
- o□Supernode
- o□Trifalga
- o□Vantage Data

EXISTING VS. UPCOMING DATA CENTERS

-□Existing Facilities in the Region (Area and Power Capacity)

- o□Sydney
- o□Melbourne
- o□Perth
- o□Other Cities

-□List of Upcoming Facilities in the Region (Area and Power Capacity)

- o□Sydney
- o□Melbourne
- o□Perth
- o□Other Cities

REPORT COVERAGE:

This report analyses the Australia data center market share. It elaboratively analyses the existing and upcoming facilities and investments in IT, electrical, mechanical infrastructure, general construction, and tier standards. It discusses market sizing and investment estimation for different segments. The segmentation includes:

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 - oStorage Systems
 - oNetwork Infrastructure
- Electrical Infrastructure
 - oUPS Systems
 - oGenerators
 - oSwitches & Switchgears
 - oPDUs
 - oOther Electrical Infrastructure
- Mechanical Infrastructure
 - oCooling Systems
 - oRack Cabinets
 - oOther Mechanical Infrastructure
- Cooling Systems
 - oCRAC and CRAH
 - oChillers
 - oCooling Towers, Condensers and Dry Coolers
 - oEconomizers and Evaporative Coolers
 - oOther Cooling Units
- General Construction
 - oCore & Shell Development
 - oInstallation & commissioning Services
 - oBuilding & Engineering Design
 - oFire Detection & Suppression Systems
 - oPhysical Security
 - oDCIM
- Tier Standard
 - oTier I & Tier II
 - oTier III
 - oTier IV
- Geography
 - oSydney
 - oMelbourne
 - oPerth
 - oOther Cities

KEY QUESTIONS ANSWERED:

1. How big is the Australia data center market?
2. How much MW of power capacity will be added across Australia from 2024 to 2029?
3. What is the growth rate of the Australia data center market?
4. What factors are driving the Australia data center market?
5. Which cities are included in the Australia data center market report?

Table of Contents:

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1. Existing & Upcoming Third-Party Data Centers in Australia
 - 1.1. Historical Market Scenario
 - 1.2. 135+ Unique Data Center Properties
 - 1.3. Data Center IT Load Capacity
 - 1.4. Data Center White Floor Area
 - 1.5. Existing Vs. Upcoming Data Center Capacity by Cities
 - 1.6. Cities Covered
 - 1.6.1. Sydney
 - 1.6.2. Melbourne
 - 1.6.3. Perth
 - 1.6.4. Other Cities
 - 1.7. List of Upcoming Data Center Projects
2. Investment Opportunities in Australia
 - 2.1. Microeconomic and Macroeconomic Factors of the Australia Market
 - 2.2. Investment Opportunities in Australia
 - 2.3. Investment by Area
 - 2.4. Investment by Power Capacity
3. Data Center Colocation Market in Australia
 - 3.1 Demand Across Several Industries in Australia
 - 3.2. Colocation Services Market in Australia
 - 3.3. Retail vs Wholesale Data Center Colocation
 - 3.4. Retail & Wholesale Colocation Pricing
4. Market Dynamics
 - 4.1. Market Drivers
 - 4.2. Market Trends
 - 4.3. Market Restraints
5. Market Segmentation
 - 5.1. IT Infrastructure: Market Size & Forecast
 - 5.2. Electrical Infrastructure: Market Size & Forecast
 - 5.3. Mechanical Infrastructure: Market Size & Forecast
 - 5.4. General Construction Services: Market Size & Forecast
6. Tier Standard Investment
 - 6.1. Tier I & II
 - 6.2. Tier III
 - 6.3. Tier IV
7. Geography
 - 7.1. Sydney
 - 7.2. Melbourne
 - 7.3. Perth
 - 7.4. Other Cities

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- 8. Key Market Participants
 - 8.1. IT Infrastructure Providers
 - 8.2. Construction Contractors
 - 8.3. Support Infrastructure Providers
 - 8.4. Data Center Investors
 - 8.5. New Entrants

- 9. Appendix
 - 9.1. Market Derivation
 - 9.2 Site Selection Criteria
 - 9.3. Quantitative Summary

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