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Solution provider to the Australian electrical market

**Data centre & EV charging  
electrical infrastructure insights**

20 June 2024

# Why are we here & what do we do?

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## Our Vision

To help build a future where sustainable electrical infrastructure creates a better life for all.

## Our Mission

To enhance every aspect of infrastructure through energy efficiency, automation and secure connectivity while prioritising the safety and wellbeing of people.



# Successfully evolving

Expanding our unique value proposition in a growing energy market



Power distribution, energy management and automation product distribution with complimentary custom assembly services



- Leading solution provider to the Australian electrical market
- Established in 2005 and listed in 2021 (ASX:IPG)
- Year-on-year growth of 37% CAGR, increasing from \$88M in FY20 to \$227M in FY23.
- Track record of successful acquisitions
- Long term blue chip customer base
- Diversified across mature and developing sectors
- Unique end-to-end value proposition



Complete electrical engineering services for high and low voltage projects, including EV charging infrastructure and data centres



Specialists in the supply, modification, repair and design of hazardous area electrical equipment

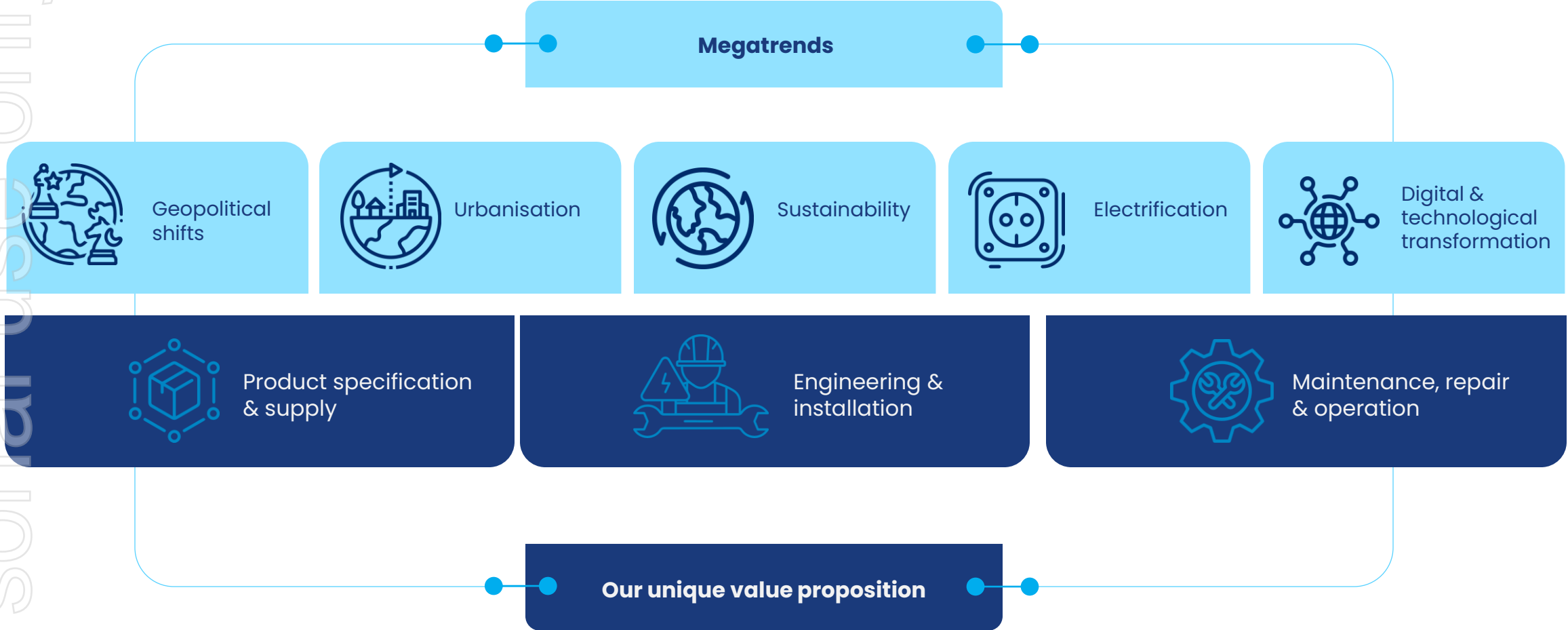


Manufacturer and distributor of electrical cables and speciality plugs

# Energy transition supporting strong fundamentals

Positioned well to consolidate value & secure long term growth

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# Data centre alignment

## Aligning with megatrends supports growth and sustainability



Aligning the electrical infrastructure required for data centres with these megatrends supports long-term growth and sustainability goals



### Geopolitical shifts

Ensuring data sovereignty and security with localised data centres powered by reliable, renewable energy sources.



### Urbanisation

Supporting the digital infrastructure needed for growing urban populations, providing essential data services.



### Sustainability

Designing energy-efficient data centres with green building practices and renewable energy sources to minimise environmental impact.



### Electrification

Transitioning data centres to use renewable energy, reducing reliance on fossil fuels and improving energy efficiency.



### Digital & technological transformation

Implementing advanced cooling technologies, AI, and machine learning for optimal performance and energy use, supporting the growing demands of digital transformation.

# Data centre sector

Integral to digital transformation and sustainable growth

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## Exponential Growth

Cloud computing and AI developments have driven exponential growth, with the global data centre market projected to grow at a 9.6% CAGR from 2023-2030.<sup>(1)</sup>

## Electrical Demand

Data centres are highly electrically dense, with electrical work the largest component of data centre construction costs.

## Our Customers

IPD Group have supported a number of data centre names with product supply and a range of electrical services including Amazon, Next DC, Hickory, Cloud Carrier and more....

# Data centre infrastructure

Leveraging our unique position in every step of the value chain

## Planning & design

- Define power requirements and design compliant electrical infrastructure.
- Conduct site surveys, establish grounding systems, and prepare the site with civil works.



Addelec provides site assessments and infrastructure design with energy management solutions.

## Product specification & supply

- Select and specify cable, transformers, busduct, switchgear, distribution boards, UPS systems and other related hardware.



IPD & CMI distribute an array of best-in-class electrical cables and hardware used in data centres.

## Electrical infrastructure & installation

- Install main electrical service equipment and set up utility connections.
- Implement redundant UPS power supply systems.



IPD manufactures distribution boards, and Addelec manages site engineering and onsite installation requirements.

## Cooling & environmental controls

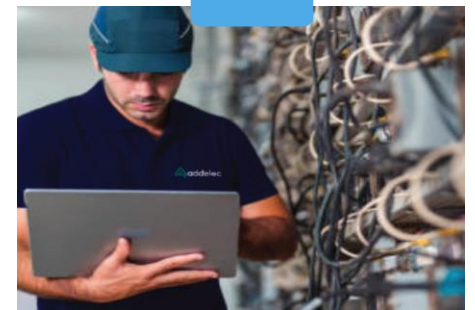
- Integrate electrical systems with HVAC and cooling solutions to manage temperature and airflow.



IPD supplies HVAC equipment, and Addelec integrates it with the electrical systems for effective cooling and environmental control.

## Inspections, approvals, & maintenance

- Conduct testing and commissioning.
- Establish operations and maintenance services to ensure continued reliability and efficiency.



Addelec offers SLAs for ongoing service, maintenance, and repair operations to ensure 24/7 availability.

# EV charging alignment

Aligning with megatrends supports growth and sustainability



Aligning the electrical infrastructure required for EV charging with these megatrends supports long-term growth and sustainability goals



## Geopolitical shifts

Developing resilient and secure EV charging infrastructure to reduce dependency on fossil fuels and enhance energy security.



## Urbanisation

Meeting the increasing demand for electric vehicles in urban areas, providing widespread and accessible charging solutions.



## Sustainability

Reducing carbon emissions by promoting the adoption of electric vehicles, supported by a robust charging network.



## Electrification

Enhancing the transition to electric mobility, integrating renewable energy sources into charging stations, and improving grid stability.



## Digital & technological transformation

Utilising smart grid technologies and IoT to optimise charging infrastructure, ensuring efficient energy use and management.



# EV charging sector

Integral to reducing carbon emissions and sustainable growth



## \$1B opportunity for IPD

Estimated 20x more chargers will be required by 2030, requiring a forecast total investment of \$18-20b.<sup>(1)</sup>

## Total Market Forecast through 2027

**DC Fast Charging Market:**  
2,100 – 2,200 DC Chargers ~650MAUD<sup>(1)</sup>

**AC Charging Market:**  
>2 Million AC Chargers ~4,000M AUD<sup>(1)</sup>

## Australia's EV fleet

By 2027, a projected 12x increase to 1M EVs.<sup>(1)</sup>

1. Scaling EV infrastructure to meet net-zero targets (McKinsey & Company)

# EV charging & infrastructure

Leveraging our unique position in every step of the value chain

## Planning & design

- Assess power requirements, site feasibility, and ensure compliance with local codes.
- Design the electrical layout and infrastructure.



## Product specification & supply

- Select appropriate EV chargers and related hardware such as busduct, cables, distribution boards, circuit breakers, energy meters, and more.



## Electrical infrastructure & charger installation

- Install distribution boards, circuit breakers, and meters.
- Ensure sufficient power supply and distribution to the charging stations.



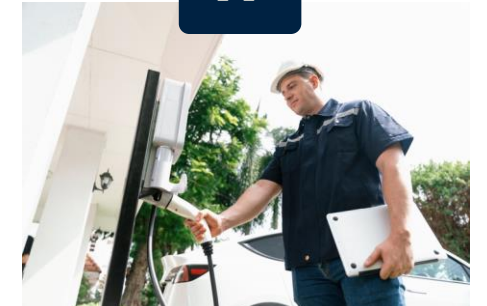
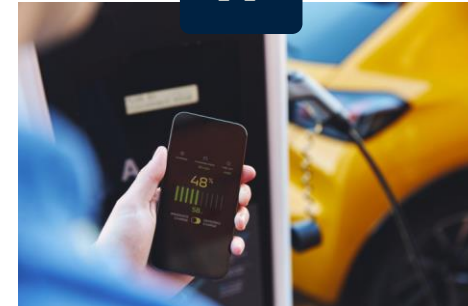
## Integration, testing, & network setup

- Integrate and commission chargers with the load management system.
- Configure monitoring software and payment systems.



## Inspections, approvals, & maintenance

- Perform final electrical inspections, obtain certifications, and verify system performance.
- Establish a maintenance program.



Addelec provides EV charging site assessments and infrastructure design with energy management solutions.

IPD & CMI distribute EV chargers, related electrical hardware, and required cable.

IPD manufactures EV charging distribution boards, and Addelec manages site installation.

Addelec integrates chargers with load management systems and configures monitoring software and payment systems.

Addelec offers SLAs for ongoing service, maintenance, and repair operations to ensure 24/7 availability.

# Why invest in IPD Group?

Energy transition to continue for decades towards 2050 net-zero emissions targets



## Connected to multiple long term drivers

- Multiple long-term growth trends to benefit IPD Group.
- Prolonged cyclical upturn expected due to investments in the energy transition still in their early stages.



## Diversity in technologies & sectors

- Our diverse technologies and solutions support a variety of customers across mature and developing sectors.
- We are aligned with the energy transition and linked to current and future phases of the digital transformation.
- Our approach safeguards against market fluctuations.



## Track record

- We're building a consistently performing business.
- Demonstrated by delivering strong growth for several years.

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# Q&A



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