

Austria Data Center Cooling - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts 2019 - 2030

Market Report | 2024-02-17 | 90 pages | Mordor Intelligence

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Report description:

The Austria data center cooling market reached a value of USD 37.1 million in the previous year, and it is further projected to register a CAGR of 5.1% during the forecast period.

Key Highlights

- In Vienna, the summers are warm, the winters are very cold, and it is partly cloudy year-round. Over the course of the year, the temperature typically varies from -2.7C to 26C. While natural cooling with river water plays a key role in the system's eco-sustainability in Austria, the required non-stop cooling capacity is majorly being ensured by mechanical means such as chillers.
- The upcoming IT load capacity of the Austria data center market is expected to reach 215 MW by 2029. The country's construction of raised floor area is expected to increase to 632.4 K million sq. ft by 2029.
- The country's total number of racks to be installed is expected to reach 31.6 K units by 2029. Vienna is expected to house the maximum number of racks by 2029. Currently, there are no submarine cable systems connecting Austria.
- In terms of development, in July 2023, Anritsu Corporation introduced the Coherent OTDR MW90010B to locate faults in submarine cables. MW90010B can evaluate up to 20,000 km and has an easily selectable wavelength that covers the full C-band. It is more portable, with a 40% weight reduction for the same product size as the previous model.

Austria Data Center Cooling Market Trends

BFSI to Hold Significant Growth

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- In Austria, the Banking 4.0 Digitalization and Transformation Conference was conducted in October 2022, which mainly assisted the stakeholders in Austria in developing an understanding of new technologies in the banking sector. It allows the creation of digital assets and supports gaining a deeper understanding of the connection between customers, strategies, and analytics.
- In 2022, 23% of all online transactions were by consumers using bank transfers. In 26% of all transactions, they used e-wallets. Although most Austrians choose cashless methods for online purchases, 5% of consumers paid using cash, which is more typical in emerging markets. In 7% of digital payments, they used various additional payment methods.
- Austrians spend modestly online, with the average annual spending a third lower than the European average of EUR 2,186 (USD 2554.62). Considering the above instances, the growing online transactions and the initiations taken by the fintech players to develop online payment methods drives the growth of data center construction and cooling solution.
- The Austrian FinTech industry has seen an increase in the number of domestic FinTech startups in the past few years, with robust growth in sectors including payments, investments, insurance, and accounting. According to a study by the Austrian Central Bank, there are currently about 300 FinTech companies in Austria. Though companies are active in various FinTech sub-sectors, payment continues to be the largest sector in the Austrian FinTech ecosystem. Overall, the increase in data traffic is expected to lead to major consumption of heat energy, leading to significant demand for the cooling solution.

Liquid Cooling to Hold Significant Growth

- Efficient cooling & heat dissipation for performance-demanding servers are possible with direct-to-chip liquid cooling. Liquid cooling ensures peak system performance and reliability while encouraging denser computing.
- Air cooling is just insufficient to sustain the dependability of IT systems in facilities with exceptionally high-density racks (usually over 30 kW), regardless of how new or optimized they may be. Liquid cooling is a better option for such a factor. Facilities such as Interxion's new facility VIE3 and STACKIT, Ostermiething (AT) DC 10 Phase 2 are the under-construction facilities having high rack density.
- A coalition of five Austrian universities known as The Vienna Scientific Cluster (VSC) released an RFP to build a third generation of the country's most powerful and efficient supercomputer. GRC (Green Revolution Cooling Inc) leveraged their patented immersion cooling technology, which maximized density by incorporating servers designed for immersion (SDI) and featured a closed-loop, zero-water-use system.
- Austria also has a mature telecom market, dominated by Telekom Austria, Magenta Telekom (formed from the merger of T-Mobile Austria and the cableco UPC Austria), and 3 Austria. The mobile market benefits from a growing number of MVNOs. Recently, in a new 5G spectrum auction, Austria raised EUR 202 million (USD 240 million). A1 secured 80 megahertz for more than EUR 65 million (USD 68.3 million), T-Mobile Austria paid approximately EUR 87 million (USD 91 million) for 90 megahertz, and Hutchison Drei Austria paid nearly EUR 50 million (USD 52.5 million) for 90 megahertz.
- The 5G technology will enable even faster data transmission rates for mobile phones with higher refresh rates and HD video streaming. These are considered one of the main drivers of the need for data center facilities in the telecom segment, which will lead to major liquid-based cooling adoption for the server.

Austria Data Center Cooling Industry Overview

Austria's data center cooling market is characterized by consolidation among key players, who have significantly enhanced their competitive advantage in recent years. Notable companies such as Stulz GmbH, Rittal GMBH & Co.KG, Schneider Electric SE, and others dominate this sector, holding substantial market shares. These industry leaders are committed to expanding their customer base throughout the region, employing strategic collaborations to bolster market share and profitability.

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In May 2022, STULZ made an important announcement regarding its innovative CyberCoolFree Cooling Booster. This groundbreaking free cooling module is designed to offer eco-friendly cooling solutions for data centers and industrial applications. The CyberCoolFree Cooling Booster is a versatile and high-performance solution that fully harnesses the substantial cost-saving potential of free cooling, whether in existing or new systems. Doing so not only enhances operational reliability and equipment longevity but also contributes to a reduction in CO2 emissions.

Additional Benefits:

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

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