

Europe Structured Cabling - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts 2019 - 2029

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Report description:

The European structured cabling market was valued at USD 11.16 billion last year and is expected to reach a value of USD 17.94 billion by the end of the forecast period by registering a CAGR of 7.24% during the forecast period. The increasing demand for connected IoT devices, growing investment in data centers and communication infrastructure, and the increasing acceptance of cloud services across various end-user industries are among the key factors driving the studied market growth.

Key Highlights

- Structured cabling is the foundation upon which all other network equipment operates and is dependent. A reliable cable infrastructure is needed to convey information efficiently over a structured network. Doing this makes it possible to guarantee the efficient handling of all crucial corporate operations, communications, and processes. By fusing telephone networks, security, local computers, and other technologies, structured cabling provides a broad environment for data transmission.
- The high bandwidth of a structured cabling system is one of its most essential features, making it a dependable framework for fostering business expansion. Adaptable IT that can react rapidly to industry developments is crucial in a competitive company environment. The need for a data center that facilitates the quick and simple creation of new services helps organizations keep current customers and continually attract new ones. The network architecture will be updated with structured cabling and handle all new applications as the company expands.
- The European region's need for data storage is increasing due to the growing adoption of cloud services and connected devices, supporting the demand for structured cabling. Also, the market for structured cabling is growing because more and more businesses in the area are using cloud computing solutions.
- The massive growth of Internet users and smart mobile communication devices drives strong demand for data center services as the amount of data generated by these devices surges. This is attracting new players in the European data center market. For instance, in August 2022, Damac Group announced it was looking into data center and technology-related investment

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opportunities in Germany worth EUR 1 billion (USD 991 million) to diversify its holdings.

-Similarly, in May 2022, Google launched Madrid-based cloud data centers to expand its European footprint. The new venture will allow Madrid's various businesses to increase cloud services, low-latency transfers, advanced storage, and computing, allotting the region a necessary boost in data protection and over-the-air enterprise needs. Since data centers often use integrated cabling systems, these trends will likely increase the demand for structured cabling.

-However, the high data transmission loss of fiber optic components and the high cost of fiber optic components are among the major factors restraining the growth of the structured cabling market in the region.

-All businesses across Europe with crucial assets have experienced a rapid decline due to the pandemic. The COVID-19 pandemic stressed Europe's overall economy across sectors and steered multiple international vendors to focus on the digital economy. Different European companies invested more in cloud infrastructure and trusted computing resources to help businesses speed up the recovery process and offer cloud-based intelligent solutions to help them with their digital transformation in the wake of the pandemic. This created a good market environment for the growth of the studied market.

Europe Structured Cabling Market Trends

Datacenter to Hold Significant Market Share

- Data centers are both the powerhouses of cloud computing and the connectors of the internet, delivering on the tripartite need for more speed, flexibility, and optimal availability. Two key drivers catalyzing the massive demand increase for data centers in the European region include the need for computing capacity, driven by the large-scale move to working from home for many businesses and institutions, and the associated uptake of digital applications in video calling, telehealth, e-commerce, and e-learning, which cause a surge in need for data capacities.

- Edge computing will play a massive role in the development of future data centers. As more and more people adopt intelligent solutions, not only in companies but also in their homes, the demand for edge computing will continue to boom, as will the need for edge computing devices. This factor and increasing research and development investments in the edge computing sector are expected to positively impact the studied market's growth. For instance, in July 2022, a new cluster of meta-operating systems research and innovation actions received EUR 64 million (about USD 68.08 million) of EU funding to revolutionize edge computing in Europe.

- UK and US investment firms recently collaborated to build a hyperscale data center. Pioneer Point (UK) and Davidson Kempner (US) plan a 450 MW data center campus in Portugal. Two funds will invest up to EUR 3.5 billion (USD 4.21 billion) in the Sines 4.0 project. The new multi-billion-dollar hyperscale data center campus will consist of five 90-MW sea-water-cooled buildings on land near a recently decommissioned coal power plant. The inauguration of the primary building is scheduled for the end of 2023. Sines 4.0 is a large-scale, 100% green data center that responds instantly to customer needs.

- Furthermore, as the environmental demands placed on data center providers continue to become more restrictive, increased attention is being focused on full lifecycle impacts, including construction, recycling, and end-of-life. Data center operators are increasingly focusing on adopting innovative solutions and techniques to drive operational efficiency in order to meet sustainability targets. With such trends expected to continue during the forecast period, the studied market is also expected to witness an upward growth trend during the forecast period.

United Kingdom to Witness Significant Growth

- The rapid proliferation of digital services and the growing number of Internet users have exponentially increased the amount of sensitive data collected by businesses in the United Kingdom. For instance, according to Hootsuite, as of January 2022, the United

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Kingdom had approximately 67 million internet users in total.

- Due to the growing demand, multiple companies offering cloud services have established extensive data center locations in the country, driving the demand for structured cabling. For instance, according to a recent survey by OpenUK, about 68% of respondents in the United Kingdom use Amazon Web Services (AWS) for their cloud infrastructure, followed by Google (49%), Microsoft Azure (47%), and others.

- The growth of the structured cabling market in the United Kingdom is also accelerating due to the increasing construction of hyperscale data centers to store huge amounts of data in the United Kingdom. For example, in February 2022, NTT said it planned to double the size of its data center in London. This was part of the company's ongoing plans to invest in the UK and help speed up digital transformation and a hybrid IT environment.

- As structured cable systems enable faster data transmission, such trends are expected to support the studied market's growth in the United Kingdom during the forecast period. Furthermore, the increasing focus on cost and time management, the growth of IoT data, and the need for business automation are also significantly contributing to the growth of the demand for the structured cabling market in the country.

Europe Structured Cabling Industry Overview

Europe's Structured Cabling Market is fragmented due to several players' presence. Major players are adopting various strategies, such as new product launches, joint ventures, partnerships, collaborations, partnerships, and acquisitions, to increase their footprints in this market and sustain it in the long run. Some key players in the market are Belden Inc., The Siemon Company, Corning Incorporated, Commscope, Inc., Anixter, Inc., and many more.

In December 2022, the Arctic data cable linking project, which was expected to link Europe to Japan, received its first investment of about EUR 1.1 billion (USD 1.5 billion) from a consortium of investors. This subsea cable was expected to be the first to be laid in the Arctic seabed, and it was responsible for internet connectivity in the affected areas.

In September 2022, W. L. Gore & Associates (Gore) announced the addition of a new European distributor for its high-speed data cables. According to the company, A.E. Petsche Company was to be its new qualified distributor for the European region. This partnership was part of the company's expansion plans in the European region.

Additional Benefits:

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

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