

Germany Data Center Construction - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts 2019 - 2029

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Report description:

The Germany data center construction market is projected to register a CAGR of 4.45%.

Key Highlights

- The upcoming IT load capacity of the Germany data center construction market is expected to reach 2356 MW by 2029.
- The country's construction of raised floor area is expected to increase by 11.8 million sq. ft by 2029.
- The country's total number of racks to be installed is expected to reach 588979 units by 2029. Moscow is expected to house the maximum number of racks by 2029.
- There are close to 7 submarine cable systems connecting Germany, and many are under construction. One such submarine cable that was built in 2016 is C-Lion1, which stretches over 1172 Kilometers with landing points in Rostock, Germany.

Germany Data Center Construction Market Trends

BFSI to hold significant market share

- The end users expected to increase IT load capacity are manufacturing, BFSI, and government services during the forecast period. Automation introduced in the manufacturing industry compared to other European nations is remarkable. For instance, Germany has 33% of Europe's robot inventory. The total number of robots in use in Germany accounts for around 230,000.
- In 2020, around 22,300 robots were installed to maintain productivity during the pandemic. The increase in automation services by the manufacturing industry is expected to increase the IT load from 130.3 MW in 2023 to 222.9 MW, registering a CAGR of

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9.4%. Other end users, such as banking, financial services, and insurance (BFSI) and government services, are expected to contribute to increasing the IT load capacity, as initiatives taken by the government for smart city development promote services such as digital transactions and online government services.

- According to the German government, 54% of its citizens utilize online services, which should increase with more efficient online processes. Germans prefer digital transactions, with around 81% using them. Online transactions using digital wallets accounted for around 44%, while 20% were estimated for in-store purchases. Due to the above-mentioned factors, end users are expected to consume more IT load during the forecast period.

Frankfurt to be a major hotspot for the market

- Frankfurt is a hotspot in Germany and is expected to increase from an IT load capacity of 1243.5 MW in 2023 to 1843.8 MW by 2029 at a CAGR of 6.8%. The hotspot has gained traction due to numerous innovative city projects, growing IT businesses, and rising users for digitized applications for streaming content and playing online games. Frankfurt has numerous sensors and microphones installed in the city, which are used for smart lighting, monitoring particulate matter for pollution, recording sounds and acting instances in case of an emergency, and smart parking apps for finding parking.

- Similarly, other evolving cities such as Cologne, Hamburg, Karlsruhe, and Munich have numerous smart city projects running to make the community safer and offer more convenience to the citizens. Additionally, the automation used in the manufacturing industry is expected to further catalyze the growth as Germany currently has a robot density of 371 units, which means 371 units per 10000 employees.

- Growing IT businesses require high specifications, automation is used in the manufacturing industry, and numerous services in smart cities would generate huge amounts of data. For processing these huge amounts of data, an increase in the number of racks could be expected during the forecast period at a projected CAGR of 7.3%, thus propelling the IT load capacity over the years.

Germany Data Center Construction Industry Overview

The Germany data center construction market is fairly consolidated, with significant companies such as Arup Group, Schneider Electric, Hewlett Packard Enterprise (HPE), Mercury Engineering, and KOHLER-SDMO.

In January 2023, CyrusOne acquired an office complex in Frankfurt, Germany, planning to turn it into a data center campus. The investment group Corum had sold the Europark office complex in Frankfurt for EUR 95 million (USD 102.3 million) before confirming that CyrusOne was the buyer. Such investments drive opportunities for the vendors studied in the market.

Additional Benefits:

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

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