Germany Data Center Rack - 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 German data center rack market reached a volume of 385,000 in the previous year, and it is further projected to register a CAGR of 7.3% during the forecast period. The increasing demand for cloud computing among SMEs, government regulations for local data security, and growing investment by domestic players are some of the major factors driving the demand for data centers in the country.

Key Highlights
-Under Construction IT Load Capacity: The upcoming IT load capacity of the German data center market is expected to reach more than 2300 MW by 2029.
-Under Construction Raised Floor Space: The country's construction of raised floor area is expected to increase above 11 million sq. ft by 2029.
-Planned Racks: The country's total number of racks to be installed is expected to reach above 5,88,000 units by 2029. Frankfurt is expected to house the maximum number of racks by 2029.
-Planned Submarine Cables: There are close to 7 submarine cable systems connecting Germany, and many are under construction. In May 2023, German transmission system operator (TSO) 50Hertz and its partners in Estonia, Latvia, and Lithuania agreed on a joint hybrid submarine cable project called Baltic WindConnector in the Baltic Sea between Estonia and Germany.

Germany Data Center Rack Market Trends

Full Rack is the fastest growing segment in 2023.

- With large amounts of data generated every day in Germany, businesses rely on data centers to efficiently manage data and storage. Therefore, the increasing use of full-rack data centers is the most important factor affecting data center rack consumption. Increasing demand for technology services and investments by large companies are also changing the market growth.
- Data consumption through smartphones has increased drastically during the historical period in Germany. The segment is expected to register a CAGR of 46.9% by 2029. A major increase in data consumption was observed in 2021 after the COVID-19 pandemic, with more users switching to smartphones due to the remote working culture in the country.
- Due to the increasing shortage of space in various companies, a full rack in the data center has taken a large part of the market share in France. The demand for full-rack data center infrastructure is increasing to cope with the increasing rack size due to the rapid growth of mobile broadband networks due to the increase in big data analytics combined with cloud computing.
- The hyperscale facility is expected to house approximately 5,000 servers and provide bandwidth speeds of approximately 40 Gbps, with a PUE ranging from 1.6 to 1.8. Large enterprises such as content-oriented companies, online game companies, and IT companies mainly prefer high processing speeds and advanced infrastructure facilities to provide users with seamless experiences and services. Therefore, full racks are used in such cases in order to be able to better store large amounts of data.

IT & Telecommunication is the largest segment in 2023

- The ongoing digitization trend in the country requires a fast and stable network capable of delivering broadband services. This will likely drive the market for telecom providers in the broadband space. Furthermore, the availability of broadband connections is a fundamental requirement for Industry 4.0, the Internet of Things, and e-government, and the expansion of broadband in Germany is of paramount concern for social well-being, quality of life, and ensuring and improving capacity. be one of To expand the company and increase its competitiveness in the coming years.
- The traditional digital methods of the telecommunications industry are evolving rapidly. For example, telephone calls are no longer the most common form of communication. Conventional text messaging could be better. Messages, video calls, and voice calls are processed over the Internet. The need for wireless service providers to keep their customers connected has decreased.
- As demand for faster connections grows, governments are providing support through deregulation, and demand for 5G is also growing. Moreover, the increasing adoption of 5G is analyzed in tandem with collaborations to boost the growth rate of the market during the forecast period. For example, in June 2022, Deutsche Telekom announced that it would be the first company to offer its 5G service on frequencies in the 700 MHz band. The use of the 700 MHz band will improve mobile phone coverage in rural Germany, according to European operators. The telco found that the 700MHz frequency is being used for 5G broadcasting with about 3,000 antennas in about 1,100 locations.
- The need for faster network connections, highlighted by the COVID-19 pandemic, accelerated FTTH adoption in Germany. The data showed that this country had the third highest growth rate of FTTH installations in Europe, and by 2022, it had increased by about 66% compared to 2021, and by 2025, large-scale installations will likely grow. This will likely attract more data center facilities and equipment. Investment opportunities that take advantage of Germany's developed conditions during the forecast period.

Germany Data Center Rack Industry Overview

The German Data Center Rack Market is moderately competitive and has gained a competitive edge in recent years. In terms of market share, a few major players, such as Black Box Corporation, Eaton Corporation, Hewlett Packard Enterprise (HPE), Rittal GMBH & Co.KG, and Schneider Electric SE, currently dominate the market. These major players with a prominent market share focus on expanding their customer base across foreign countries.

In November 2022, Vantage Data Centers announced delivering three new facilities in Berlin and Frankfurt and opening a new German office in Raunheim. The two-story, 130,000 square foot (12,000 square meters) facility offered 16MW of IT capacity to hyperscalers and large cloud providers.

In October 2022, Eaton Corporation announced the launch of an Open Rack v3 (ORV3) compatible solution by the Open Compute Project (OCP). It was purpose-built and pre-configured, focused on providing critical power in an efficient and scalable manner for data centers wishing to deploy ORV3 racks.

Additional Benefits:

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

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