

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

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Report description:

The Italy data center construction market is projected to register a CAGR of 14.82%.

Key Highlights

- The upcoming IT load capacity of the Italy data center construction market is expected to reach 805.2 MW by 2029.
- The country's construction of raised floor area is expected to increase to 5.36 million sq. ft by 2029. The country's total number of racks to be installed is expected to reach 268,408 units by 2029. Greater Milan will likely house the maximum number of racks by 2029.
- There are close to 19 submarine cable systems connecting Italy, and many are under construction. One such submarine cable, estimated to be built by the end of 2025, is Unitirreno Cable, which stretches over 890 Kilometers with landing points in Fiumicino, Genoa, and Mazara del Vallo in Italy.

Italy Data Center Construction Market Trends

BFSI to hold significant market share

- Media & entertainment, manufacturing, BFSI, e-commerce, and government services are the end users likely to catalyze growing IT load capacity by increasing data consumption. It is expected that the Italian government will improve its services, leading to a rise in power capacity from 23.8 MW in 2023 to 61.6 MW in 2029.
- The government, an end user, is projected to hold 8% of the market share in 2023 and grow to 9% by 2029. Manufacturing is

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expected to grow by 19.2% during the forecast period. It is expected to reach 95.8 MW in 2029. Manufacturing accounts for 23.6% of GDP. Italy has around 5,000 companies and is known for its machinery. Italy has already introduced Industry 4.0 to its manufacturing companies to cater to surplus demand.

- Automation and technology are expected to catalyze data consumption. Additionally, factors such as online shopping would contribute to the increasing generation of data and processing facilities. As users grow more inclined to online shopping with attractive deals offered, this would lead to a rise in digital payment services and traffic on websites, thus increasing data consumption. All these factors would contribute to a significant increase in consumption, boosting the demand for data centers.

Greater Milan to host more Data Center Construction during the Forecast

- Greater Milan operated at an IT load capacity of 269 MW in 2022, which is anticipated to grow from 305.5 MW in 2023 to 629 MW by 2029 at a CAGR of 12.8%. The development of smart cities in Milan and Bergamo regions may trigger the increase in smart devices, requiring data centers to process these huge pools of data, simultaneously increasing the IT load capacity over the years.

- Growing IT businesses, streaming services, and online gaming are expected to further trigger the demand. For instance, developing ICT solutions for the traffic management system to be used in these regions would enable transport planners and decision-makers to understand and predict the travel behavior of city users. The city used a network of Wi-Fi sensors to collect traffic data from the beginning of January 2020 to the end of July 2020.

- The availability of suitable land, favorable laws, and environmental factors are some considerations that help data center companies foresee the future of their establishment. Considering the growing demand and development of smart cities in the region, data center companies prefer constructing data centers in the Greater Milan region.

- The market share of massive-sized data centers is expected to increase from 8.2% in 2022 to about 34% by 2029, registering a CAGR of 36.2%. Companies like Stack Infrastructure and Compass and Hines announced plans to develop massive facilities, adding IT load capacities of 35 MW and 48 MW, respectively, in the region.

- Since most clients prefer massive facilities, small data centers may witness minimum growth during the forecast period, catering to the growth of SMEs and new customers.

Italy Data Center Construction Industry Overview

The Italy Data Center Construction Market is fairly consolidated, with significant companies such as AECOM, Arup Group Limited, Legrand, Daikin Applied, and STULZ.

In June 2023, Microsoft announced its first cloud region consisting of three data centers in Italy. The new data centers are upgraded with Microsoft Azure or Microsoft 365, with Dynamics 365 and Power Platform. Such developments increase the need for servers and racks, resulting in opportunities for vendors in the market.

In January 2023, Tech leaders formed an Italian Data Center Association that consists of developers and operators such as Microsoft, Equinix, Rai Way, Data4, STACK Infrastructure, Digital Reality, Vantage Data Centers, and CBRE Data Centers. Such developments are expected to boost 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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