

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

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Report description:

The Italy data center cooling market reached a value of USD 233.5 million in the previous year, and it is further projected to register a CAGR of 10.9% during the forecast period.

Key Highlights

- 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.
- The upcoming IT load capacity of the Italy data center market is expected to reach more than 800 MW by 2029. The country's construction of raised floor area is expected to increase above 5.3 million sq. ft by 2029. The country's total number of racks to be installed is expected to reach above 268K units by 2029. Greater Milan is expected to house the maximum number of racks by 2029.
- The average winter temperature is between 0 C (32 F) in the Alps and 12 C (54 F) in Sicily, so the average summer temperature is between 20 C (68 F) to over 25 C (77 F). Winters can vary widely across the country, with frequent cold, fog, and snow periods in the north and more pleasant weather in the south. Depending upon climatic conditions, the DC cooling is done in the DC facilities.
- New data centers across the country focus on implementing state-of-the-art monitoring systems to mitigate the risks associated with extreme weather events, and many would use the latest, more energy-efficient cooling technologies, such as redundant cooling systems, smart monitoring technologies, and backup power generators to ensure consistency of temperature in the event of power interruptions. Another example is direct liquid cooling, which uses a higher thermal transfer of water to a more efficient cooling device.
- There are close to 31 submarine cable systems connecting Italy, and many are under construction. One such submarine cable that is estimated to start service in 2024 is Blue, which stretches over 4,696 Kilometers with landing points from Genoa-, Golfo

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Aranci-, Palermo-, and Rome-Italy.

Italy Data Center Cooling Market Trends

IT & Telecommunication Segment Holds the Major Share

- Cloud services are gaining popularity in Italy. The need for big data integration and the demand for more remote work and data migration to the cloud are driving the use of domestic cloud data centers.
- Additionally, Italy's data center providers are gradually collaborating with local and international technology companies to offer a wide range of services to their customers.
- Cloud infrastructure helps companies manage fluctuating demand and reduces IT expenditure. It also provides companies with flexibility where employees working in various geographical locations can access files on their system from the cloud.
- Features such as increased scalability, flexibility, and accommodating website traffic fluctuations are among the reasons businesses adopted the cloud service. Businesses and governments have increasingly adopted cloud services to promote digitization services in the country. The Italian government has set a budget of around EUR 1.9 billion (USD 2 billion) for the next five years to promote digitization services. As the Italian government transitioned to the cloud system, taxpayers saved around EUR 87 million (USD 92.25 million) annually.
- The telecom segment uses a hybrid cloud infrastructure combining public and private cloud services in varying phases. This helps them manage traffic fluctuations and deliver optimum performance. Cloud services have helped telecoms increase efficiency in service deployment and reduce downtime.
- Further, Increased bandwidth speeds of 37.89 Mbps offered on 4G led to mobile data consumption at 13.3 GB/month in 2022. It is expected to increase from 15.2 GB/month in 2023 to 26.7 GB/month in 2029. Factors that catalyze data consumption increase are evolving 5G technology, online gaming, banking services, over-the-top (OTT), online shopping, and others. Such instances in the market are expected to create more demand for data center cooling infrastructure manufacturers in the coming years.

Liquid-based Cooling is the Fastest Growing Cooling Technology

- In data centers, liquid cooling offers many benefits, and it is an attractive option to cool computing environments with high performance. The use of liquid cooling has been shown to be more energy efficient compared with conventional air conditioning. It reduces the need for overcooling and improves the energy efficiency of data centers by providing precise temperature control.
- Technological advances have helped to reduce the data center's water consumption by more than 15% in tropical climates and 80% in green areas, making liquid cooling easier to maintain, scale up or be affordable. Energy used for liquid cooling may be recycled to heat buildings and drinking water, while advanced artificial refrigerants can significantly reduce the carbon footprint of air conditioners.
- Liquid cooling takes advantage of the space constraints and superior heat transfer properties of water or other liquids to provide efficient and cost-effective cooling of high-density racks up to 3000 times more efficiently than air. Long proven in mainframe and gaming applications, liquid cooling is increasingly being used to protect rack servers in regional data centers.
- Furthermore, factors such as online shopping 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. The total number of unique users of e-commerce and applications in Italy increased from 35.5 million in September 2020 to 38.1 million in September 2022. All these factors would contribute to a significant increase in consumption, boosting the demand for data centers.

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Italy Data Center Cooling Industry Overview

The upcoming construction projects in the DC sector across the country are poised to drive increased demand for Data Center Cooling solutions in the coming years. The Italy Data Center Cooling Market is currently characterized by a moderate level of fragmentation, featuring several key players, which include GmbH, Rittal GMBH & Co.KG, Schneider Electric SE, Vertiv Group Corp., and Mitsubishi Electric Hydronics & IT Cooling Systems S.p.A. These leading market participants, holding significant market shares, are dedicated to expanding their respective customer bases within their regions.

In December 2022, Vertiv introduced their Water-Efficient Liquid Cooling Solution, known as Liebert XDU. This innovative solution represents a new generation of heat management technologies explicitly designed to support liquid-cooled servers. It empowers users to monitor and regulate fluid flow, pressure, and temperature, primarily tailored for High-Density Data Centers in the Europe, Middle East, and Africa (EMEA) regions.

In July 2022, Chindata Group, a renowned provider of carrier-neutral hyperscale data center solutions, collaborated with Vertiv Technology, a leading research partner, to jointly launch the Coined X-Cooling solution. This collaborative effort has set a groundbreaking benchmark for the industry by enabling data centers to attain zero WUE cooling, signifying a significant leap forward in the quest for more efficient data center cooling solutions.

Additional Benefits:

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

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