

Italy 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 Italian data center rack market reached a volume of over 117,000 in the previous year, and it is further projected to register a CAGR of 14.8% 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 Italy data center market is expected to reach more than 750 MW by 2029.
- Under Construction Raised Floor Space: The country's construction of raised floor area is expected to increase above 5 million sq. ft by 2029.
- Planned Racks: The country's total number of racks to be installed is expected to reach above 268,000 units by 2029. Greater Milan is expected to house the maximum number of racks by 2029.
- Planned Submarine Cables: There are close to 31 submarine cable systems connecting Italy, and many are under construction. For instance, in March 2023, The Tim Group operated a state-of-the-art high-speed submarine data cable that will link Italy with France, Greece, and Israel across the Mediterranean and connect to other data backbones to India.

Italy Data Center Rack Market Trends

IT & Telecommunication sector accounted for majority market share

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- The ICT sector includes both IT and telecommunications markets. IT investment is on the rise, and the demand for the ICT market is expected to grow significantly over the next five years. For example, TIM Group (Telecom Italia S.p.a.) has partnered with Cisco to provide cloud services to private enterprises and government agencies. The growing need to consider and start investing in cloud technology has greatly fueled the growth of his ICT market in Italy.
- There is increasing government investment to promote the development of numerous technologies such as 5G, AI, IoT, machine learning, and big data. Moreover, the advent of digital transformation is expected to drive the growth of the Italian ICT market. Capgemini Invent, for example, is expanding its presence in Europe by launching all its products in Italy. The company offers a comprehensive portfolio of services in Italy, including intelligent industrial strategy and business transformation services.
- The government has committed to developing the ICT industry, bringing new growth opportunities to the ICT market. For example, Italy's National Recovery and Resilience Plan will likely provide a positive impetus and impact on the ICT market in 2021-2024. Italy is one of the leading providers of the digital market. In the three years from 2022 to 2024, the major technological drivers will continue to be cloud computing, big data, artificial intelligence (AI), Internet of Things (IoT), and cybersecurity.
- As more and more cities deploy smart systems and develop into smart cities, the demand for massive computing facilities is expected to grow proportionately. His VOD subscribers in Italy have increased fivefold. The IT & Telecom sector is, therefore, expected to drive the growth of Tier-4 and Tier-3 facilities in line with the vast amount of data being generated.

Full Rack is the fastest growing segment

- With large amounts of data generated every day in Italy, 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.
- The increasing demand for bandwidth among large businesses such as content-oriented companies, online gaming, and IT businesses has called for advanced infrastructural facilities, as it helps them provide optimum performance to their users. The advertisement and digital content market value in the gaming and entertainment industry increased substantially, suggesting the growth of digital media in the region, which in turn requires uninterrupted service for data processing and storage.
- Further, 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 Italy. 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.
- Amazon, eBay, Facebook Marketplace, Alibaba, Zalando, ePrice, and Tmall are e-commerce services used in Italy. Amazon is the market leader with about 38% market share, followed by eBay (19%) and Facebook Marketplace (12%). With the easing of pandemic restrictions, people have started exploring the market before buying online. 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. The growing number of individual users indicates an increasing demand for domestic data storage facilities and processing centers.

Italy Data Center Rack Industry Overview

The Italian 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 ITRack S.r.l. currently dominate the market.

In March 2023, Local real estate company Vitali Spa planned a new data center outside Bergamo, Italy. Arsen is a municipality in the Principality of Bergamo, Lombardy. The Innovation Hub will likely cover 181,000 square meters (1.95 million square feet) of

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now lush farmland near the former Tre Cantoni quarry, and construction is expected to begin in 2024. Growth in DC facilities would increase the use of racks in the future.

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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