

Spain 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 Spanish data center rack market reached a volume of around 183,000 units in the previous year, and it is further projected to register a CAGR of 10.7% 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.

Under Construction IT Load Capacity: The upcoming IT load capacity of the Spain data center rack market is expected to reach 1,400 MW by 2029.

Under Construction Raised Floor Space: The country's construction of raised floor area is expected to increase to 6 million sq. ft by 2029.

Planned Racks: The country's total number of racks to be installed is expected to reach over 330,000 units by 2029. Madrid will likely house the maximum number of racks by 2029.

Planned Submarine Cables: There are close to 32 submarine cable systems connecting Spain, and many are under construction.

Spain Data Center Rack Market Trends

Cloud segment to hold major share in the market

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- The increasing use of the cloud by large companies, driven by technologies such as big data and artificial intelligence, is the main driver of the Spanish market. The number of companies in the IT solutions and services industry has grown significantly from 16,648 in 2017 to 18,264 in 2019.
- Increased adoption of cloud-based services has fueled the expansion of retail and wholesale colocation services in Spain, leading to increased demand. This will require more racks in the data center.
- The cloud service market, which is indispensable for digitalization, is growing rapidly. With the rise of the digital economy and increased internet usage in Spain, the need for data storage and processing is increasing.
- The proliferation of hybrid cloud service providers has increased demand for colocation services and increased rack utilization.
- The government has allocated Euro 84 million (USD 90.81 million) for the expansion and improvement of the Central Government Private Cloud (SARA Cloud) initiative. The use of the cloud facilitates the development of new business models, enabling companies of all sizes and industries to innovate and gain a competitive edge.

Full rack segment to hold major share in the market

- As businesses generate massive amounts of data every day, they are increasingly relying on data centers to efficiently manage their databases and storage. A major factor driving the use of data center racks, therefore, is the increasing use of fully configured data centers.
- In addition, market growth is influenced by rising demand for IT services and investment by large enterprises.
- Initially, the focus was limited to data center rack space. Only size and cost were considered in the deployment. Still, data center rack space utilization is likely to increase further as users grow in various verticals such as online banking, telecommunications, media, entertainment, and other high-density applications.
- In Spain, full racks hold a large share of the market due to the growing space shortage between various companies. A fully racked data center needs to be built to cope with increasing rack capacity due to mobile broadband, the rapid growth of e-commerce, and the rise of big data analytics combined with cloud computing.
- For example, in Spain, the e-commerce user base reached 30 million, with an e-commerce penetration rate of 63%. The number of e-commerce users is expected to grow by 25% to 37 million by 2025. The growing number of electronic payment users has increased the capacity of data storage, and the increasing number of hyperscalers has enabled more racks in data centers.

Spain Data Center Rack Industry Overview

The Spanish Data center rack market is relatively high in terms of competition and has a few players in the market, such as Esnova Racks S.A., Espaciorack, SL, Vertiv Group Corp., Eaton Corporation, Black Box Corporation, Rittal GMBH & Co.KG, Schneider Electric SE, Dell Inc., nVent Electric PLC, Hewlett Packard Enterprise. These major players focus on expanding their customer base in the country. These companies leverage strategic collaborative initiatives to increase their market share and profitability. The increase in the data center construction corresponds to increasing demand for the number of racks in the data centers.

In January 2022, Global Switch announced to lead a 360MW data center campus project in Madrid, Spain. The data center will be developed on a 700-hectare site, and investment is expected to reach up to EUR5 billion (USD 5.67 billion). The data center will be online by 2025.

In October 2022, Equinix was to open an IBX facility, known as MD6, with an area of 1,466 sqm (15,780 sq ft) and a power of 4.8 MW, offering a capacity for 600 racks.

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Additional Benefits:

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

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