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

Market Report | 2024-02-17 | 90 pages | Mordor Intelligence

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Report description:

The Switzerland data center construction market is projected to register a CAGR of 5.35%.

Key Highlights
-The upcoming IT load capacity of the Switzerland data center construction market is expected to reach 676.2 MW by 2029.
-The country's construction of raised floor area is expected to increase by 2.6 million sq. ft by 2029.
-The country's total number of racks to be installed is expected to reach 130,041 units by 2029. Zurich is expected to house the maximum number of racks by 2029.
-In 2022, there were 93 colocation data center facilities in Russia. Moscow is the major hotspot, followed by St. Petersburg and others in the country. Some factors contributing to the growth of the data center in the country include cloud adoption, an increase in broadband connectivity, smartphone penetration, and growing digitization.

Switzerland Data Center Construction Market Trends

IT and Telecom to have significant market share

- The cloud segment registered an IT load capacity of 70.93 MW in 2022. It is projected to exhibit a CAGR of 7.19% and surpass a capacity of 117.96 MW by 2029. On the other hand, the e-commerce and BFSI industries are estimated to record CAGRs of 7.17% and 7.21% to reach capacities of 89.07 MW and 82.45 MW, respectively, by 2029.
- Among end-user industries, cloud (19.6%) and e-commerce (14.80%) are expected to hold the highest market share, while the

banking, financial services, and insurance (BFSI) (13.7%) and manufacturing (11.6%) industries are expected to witness the fastest growth over the forecast period.
- The Swiss data center market has also been driven by growing cloud use across companies because of their increasing integration of emerging technologies like artificial intelligence, big data, and blockchain. Cloud computing (anything-as-a-service (XaaS)) continues to be one of the most important trends in the Swiss IT industry. However, while most cloud solutions are still deployed in-house (besides traditional outsourcing and managed services), software-as-a-service (SaaS), in particular, is becoming increasingly important as a procurement model.
- In 2019, private clouds were most commonly used (63%), and public and hybrid clouds were on par with shares of 28% each. However, hybrid scenarios continue to gain popularity as companies seek to offer an IT services mix customized as per individual preferences. Considering the above developments, the cloud data center segment is expected to account for a majority of capacity in the Swiss data center market by 2029.

Zurich to host many data center construction in the country

- The total IT load capacity in the Zurich hotspot reached 270.1 MW in 2022 and is further projected to exhibit a CAGR of 5.39%, surpassing 399.1 MW by 2029. On the other hand, the rest of Switzerland is predicted to register a CAGR of 5.29% to reach a capacity of 277.16 MW by 2029.
- Zurich is a significant financial hub in Europe. The banking industry produces about a third of the city's wealth and a quarter of its jobs. The Zurich economy is heavily based on various creative small and large firms and sectors.
- Zurich is an ideal place to locate for fintech, energy and environment, and food tech startups. Zurich has 117 fintech startups, 53 energy and environment startups, and 47 food tech startups. Thus, the increasing number of startups is expected to complement the data center market in the region.
- Geneva, Baar, Bern, Gland, Luzern, Lausanne, and others in the Rest of Switzerland region are expanding. Geneva is the second-largest city in terms of population in Switzerland. In 2021, Geneva was ranked as the world's ninth most important financial center for competitiveness by the Global Financial Centres Index, fifth in Europe behind London, Zurich, Frankfurt, and Luxembourg. Geneva 4G network availability increased from 88.4% in 2019 to 91.6% in 2021, and Bern 4G availability reached 93.6% with an average download speed of 64.3 Mbps. Thus, cities other than Zurich may see an increase in the construction of data centers in the years to come.

Switzerland Data Center Construction Industry Overview

The Switzerland data center construction market is moderately consolidated, with significant companies such as Arup, DPR Construction, Legrand, KOHLER-SDMO, and AECOM.

In January 2023, a new data center facility opened in Zurich's Dielsdorf neighborhood owing to Swiss data center operator Green. On a 46,000 sqm (495,150 sq ft) site, the Zurich Metro campus will eventually consist of three buildings (M, N, and O).

Additional Benefits:

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

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1 INTRODUCTION

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