

Western Europe Data Center Construction Market - Industry Outlook & Forecast 2024-2029

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Report description:

The Western Europe data center construction market is expected to grow at a CAGR of 8.14% from 2023 to 2029.

KEY HIGHLIGHTS

- The Climate Neutral Data Center Pact has significantly improved the sustainability of Western European data centers. By 2030, all signatories commit to powering their facilities with renewable energy.
- By October 2022, over 100 companies had signed the Climate Neutral Data Center Pact, representing over 90% of European data center capacity.
- Western Europe is the top choice for hyperscale facility development due to free and air-based cooling availability. This advantage helps reduce power consumption in these regions.
- Data center investors are increasingly choosing locations like Spain, Portugal, Greece, and others with abundant renewable energy and reasonable land prices.
- Industry leaders like Microsoft, Meta, and Google are at the forefront of developing sustainable hyperscale facilities. Colocation data center developers also contribute by adopting initiatives like HVO, sustainable construction materials, and green facades.
- Significant growth has been made in greenfield and modular data center developments. The modular data center developments are increasing as construction methods are deemed inefficient due to labor shortages, budget constraints, and construction delays in certain countries across the region. The increased demand for modular solutions from data center operators is increasing the revenue of modular data center solutions providers such as Vertiv, Dell Technologies, and HPE, among others.
- The government's interest in promoting data center investments through land for development, renewable energy procurement, and reducing electricity tariffs will drive the colocation market in Europe during the forecast period.

KEY TRENDS

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Rising AI Wave Boost Data Center Investment

- Continuous growth in AI propels an increased need for data centers and supports the growth of the Western Europe data center construction industry.
- Cutting-edge technologies increase demand for advanced data storage and processing facilities.
- Western Europe experienced a surge in establishing and expanding data centers to accommodate the escalating demand.
- Data centers are pivotal in supporting the infrastructure for developing and deploying AI solutions.
- Due to the rising use of AI, Western Europe's growing data center industry positively impacts the economy, generating job opportunities and fostering innovation in the technology sector.

Utilizing Advanced Cooling Technologies

- Growing sustainability efforts drive data centers to adopt innovative cooling methods. Large operators focus on reducing power use with approaches like tropical testbeds and underwater centers.
- Data centers use diverse cooling methods, such as free cooling and underwater centers, demonstrating a commitment to cost-effective, eco-friendly operations.
- Liquid immersion cooling, using dielectric oil, proves cost-effective for managing heat from high-performance servers.
- "Direct-to-chip cooling enhances efficiency by directly cooling chips, addressing the sustainability challenges of traditional water cooling.
- Immersion cooling solutions, including Direct-to-Chip Cooling, aim to overcome sustainability challenges tied to water consumption in traditional cooling methods, making operations more eco-friendly and efficient.

Chip-Level Security in Data Centers

Data centers are increasingly focusing on improving security at the core level through chip-level security-a trend highlighting a growing commitment to enhanced safeguards. This involves implementing advanced security measures directly at the chip level to address threats more effectively and strengthen overall resilience. Chip-level security emphasizes hardware-based protections, using microarchitecture features to strengthen data centers against evolving cyber threats. This trend marks a move toward comprehensive security integration, with chip-level measures as a foundational layer for a robust security posture in data center environments.

SEGMENTATION INSIGHTS

- Embracing modular power infrastructure in data centers is poised to yield long-term cost savings. These systems boast higher efficiency, require less maintenance, and save space.
- Monitoring's importance is on the rise, fueled by the uptake of real-time monitoring software featuring automation and AI capabilities. This technology predicts maintenance needs, identifies component failures, and executes automatic switchovers for uninterrupted operations.
- Cooling techniques in regions with favorable climates are on the upswing, including using evaporative coolers to cool data centers efficiently.
- Anticipate data centers to adopt innovative designs like district heating as part of their evolution.
- Beyond the initial setup, data centers focus on enhancing physical security. They are utilizing real-time data center infrastructure management systems (DCIM) for continuous monitoring and management of facilities.

The report includes the investment in the following areas:

- Infrastructure

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- o Electrical Infrastructure
- o Mechanical Infrastructure
- o General Construction
- Electrical Infrastructure
- o UPS Systems
- o Generators
- o Transfer Switches & Switchgear
- o PDUs
- o Other Electrical Infrastructure
- Mechanical Infrastructure
- o Cooling Systems
- o Racks
- o Other Mechanical Infrastructure
- Cooling Systems
- o CRAC and CRAH Units
- o Chillers Units
- o Cooling Towers, Condensers, and Dry Coolers
- o Economizers & Evaporative Coolers
- o Other Cooling Units
- Cooling Techniques
- o Air-based Cooling
- o Liquid-based Cooling
- General Construction
- o Core & Shell Development
- o Installation & Commissioning Services
- o Engineering & Building Design
- o Fire Detection & Suppression
- o Physical Security
- o DCIM/BMS Solutions
- Tier Standards
- o Tier I & Tier II
- o Tier III
- o Tier IV
- Geography
- o UK
- o Germany
- o France
- o Netherlands
- o Ireland
- o Switzerland
- o Italy
- o Spain
- o Belgium
- o Portugal
- o Other Western European Countries

VENDOR LANDSCAPE

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-□The increasing demand for data centers nationwide will provide significant opportunities for construction contractors to generate revenue. Some well-known construction contractors in the Western Europe data center construction market include AECOM, AEON Engineering, Arup, Basler & Hofmann, Bouygues Construction, Callaghan Engineering, Cap Ingelec, Collen, DPR Construction, Future-tech, Mercury, PM Group, Turner & Townsend, Winthrop Engineering and Contracting, and many more.

-□Major players Colt Data Centre Services (COLT DCS), CyrusOne, DATA4, Digital Realty, Echelon Data Centers, Equinix, Global Switch, Iron Mountain, NTT Global Data Centers, Orange Business Services, Vantage Data Centers, Yondr, and others have made substantial investments in the Western Europe data center construction market.

-□Microsoft, Meta (Facebook), and Google are the major hyperscale operators investing in the Western Europe data center construction market.

-□Prominent Support Infrastructure Providers

o□3M

o□ABB

o□Airedale International Air Conditioning

o□Alfa Laval

o□Carrier

o□Caterpillar

o□Condair

o□Climaveneta

o□Cummins

o□D'HONDT THERMAL SOLUTIONS

o□Daikin Applied

o□Delta Electronics

o□Eaton

o□ebm-papst

o□EMICON INNOVATION AND COMFORT

o□Enrogen

o□FlaktGroup

o□Grundfos

o□Guntner

o□GESAB

o□HiRef

o□HITEC Power Protection

o□Honeywell

o□Johnson Controls

o□KOHLEK-SDMO

o□KyotoCooling

o□Legrand

o□Mitsubishi Electric

o□Munters

o□Nlyte Software (Carrier Global Corporation)

o□Perkins Engines

o□Piller Power Systems

o□Riello Elettronica (Riello UPS)

o□Rittal

o□Rolls-Royce

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- o Schneider Electric
- o Siemens
- o Socomec
- o STULZ
- o Trane (Ingersoll Rand)
- o Vertiv
- o ZIEHL-ABEGG

- Prominent Construction Contractors

- o AECOM
- o AEON Engineering
- o APL Data Center
- o ARC:MC
- o Ariatta
- o ARSMAGNA
- o Artelia
- o Arup
- o Atkins
- o Basler & Hofmann
- o BENTHEM CROUWEL ARCHITECTS
- o Bouygues Construction
- o Cap Ingelec
- o Collen
- o Deerns
- o DPR Construction
- o Eiffage
- o EYP MCF
- o Ferrovial
- o Future-tech
- o ICT Facilities
- o IDOM
- o ISG
- o JCA Engineering
- o JERLAURE
- o Kirby Group Engineering
- o Linesight
- o LPI Group
- o M+W Group (EXYTE)
- o Mercury
- o NORMA Engineering
- o PM Group
- o PQC
- o Quark
- o RED Engineering Design
- o Reid Brewin Architects
- o Royal HaskoningDHV
- o Skanska

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- o SPIE UK
- o Starching
- o STO Building Group
- o STS Group
- o studioNWA
- o TPF Ingenierie
- o TTSP
- o Turner & Townsend
- o Winthrop Technologies

- Prominent Data Center Investors

- o AtlasEdge
- o Aruba
- o China Mobile
- o Colt Data Centre Services (COLT DCS)
- o CyrusOne
- o DATA4
- o Digital Realty
- o Echelon Data Centres
- o EdgeConneX (EQT Infrastructure)
- o Equinix
- o Euclilde Data Centers
- o Meta (Facebook)
- o Global Switch
- o Google
- o Iron Mountain (IO)
- o KDDI (Telehouse)
- o LCL Data Centers
- o Microsoft
- o Nautilus Data Technologies
- o NDC-GARBE Data Centers Europe
- o NTT Global Data Centers
- o Orange Business Services
- o Proximity Data Centres
- o Pure Data Centres
- o T5 Data Centers
- o Telecom Italia Sparkle
- o Vantage Data Centers
- o VIRTUS Data Centres (ST Telemedia Global Data Centres)
- o Yondr

- New Entrants

- o CloudHQ
- o Form8tion Data Centers (Thor Equities)
- o Global Technical Realty
- o Goodman
- o Mainova WebHouse

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KEY QUESTIONS ANSWERED:

1. What is the growth rate of the Western Europe data center construction market?
2. What is the estimated market size in terms of area in the Western Europe data center construction market by 2029?
3. How big is the Western Europe data center construction market?
4. What are the key trends in the Western Europe data center construction industry?
5. How many MW of power capacity is expected to reach the Western Europe data center construction market by 2029?

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