Germany Data Center - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts (2025 - 2030)

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Report description:

The Germany Data Center Market size is estimated at 1.69 thousand MW in 2025, and is expected to reach 2.33 thousand MW by 2030, growing at a CAGR of 6.64%. Further, the market is expected to generate colocation revenue of USD 3,055.7 Million in 2025 and is projected to reach USD 4,486.7 Million by 2030, growing at a CAGR of 7.98% during the forecast period (2025-2030).

Tier 3 data center accounted for majority share in terms of volume in 2023, and is expected to dominate through out the forecasted period

- The tier 4 segment leads the German data center market based on tier capacity. The segment's capacity is expected to grow from 524.3 MW in 2023 to 1112.5 MW by 2029, with a CAGR of 13.4%. With evolving technology, the German population is increasingly adopting various internet devices such as desktops, tablets, smartphones, consoles, and smart gear for streaming content, home security, online gaming, and other services.
- This trend has led to a shift from traditional desktops or laptops to a range of new devices. Initially, data centers were meant to cater to the minimal requirements of clients. Thus, they were small in size and had Tier 1 & 2 certifications and minimum racks.
- With the growing adoption of new devices and the implementation of a 5G network to provide the necessary speeds to use these devices at the fullest potential, companies are shifting toward facilities that offer uninterrupted computing services. Therefore, the market share of tier 4 facilities is expected to increase from 34% in 2023 to 47.2% in 2029.
- The number of people living in smart cities accounts for around 76%, which is expected to increase further. For instance, smart cities such as Weimar have transitioned their street lighting from traditional bulbs to smart LEDs due to rising energy prices. Around 83% of the lighting has been replaced with the smart lighting system, thus helping save energy of 100,000 kWh and reduce lighting expenses. Such infrastructural developments are supported by tier 3 and 4 facilities with minimal downtimes, thus

complementing the growth of these segments in the market.

Germany Data Center Market Trends

Surge in 5G-enabled smartphones and m-commerce is boosting the data center market

- Smartphone usage in Germany is expected to increase and register a CAGR of 1.4% by 2029. Smartphone usage is growing among the younger audience, with about 81% between the ages of 16 and 29 using their smartphones to shop online. It further highlights how m-commerce is driving the market growth. Also, the overall usage of the smartphone for shopping online increased from 54% in 2020 to about 60% in 2021, suggesting the digital inclusiveness of the market.
- The data from GFU suggested that the average price of a smartphone increased from about EUR 489 in 2018 to EUR 555 in 2021. Also, the smartphone revenue generated by the country increased from EUR 10,860 million in 2019 to EUR 11,930 in 2021. This highlights the buying power and requirement of smartphones among the buyers in the country, contributing to the increasing number of smartphones. As more 5G-enabled smartphones are available in Germany, users are expected to continue to buy the devices and leverage the growing bandwidth and network infrastructure. Major network service providers are aiming to extend the 5G service coverage to almost the entire population of the country by 2025, driving the smartphone market during the forecast period.
- With the smartphone adoption rate of 80% in 2021 to increase to about 84% by 2025 and an estimated subscriber penetration rate of 89% by 2025, the region is expected to see a rise in the number of smartphones. This would create more data-generating points, creating demand for data centers to provide the required processing platforms for smartphone-centric software and online storage options in Germany.

Surge in adoption of FTTH technology boost the data center market

- Most of Germany's network and internet infrastructure comprises copper wire networks delivering the internet to households and businesses. The data provided by the Organization for Economic Cooperation and Development suggested only about 2% of the broadband connections accounted for pure fiber-optic systems in 2019, increasing to just 5.4% in 2022, which still indicated more than 90% of the rest of the connections to use improved copper connections. The companies used vectoring technology to enhance the copper wire network, which still could not get speeds exceeding 250 Mbps even in the areas with better network availability.
- Being a part of the EU, "Europe 2020" pushed the network development with a common goal to provide 100 Mbps to 50% of households by 2020. However, despite vectoring technology and large-scale DSL implementation, by 2017, only about 77% of German households received speeds of about 50 Mbps, far less than the targeted speeds. However, for fiber connectivity expansion, in 2019, the German government announced a plan to invest EUR 12 billion to achieve about 1,000 Mbps speed at a large scale by 2025.
- The requirement for faster network connectivity highlighted in the COVID-19 pandemic has hastened the introduction of FTTH in Germany. The data suggested that the country exhibited the third-highest growth rate in FTTH deployment in Europe, with an increase of about 66% in 2022, compared to 2021, with goals for considerable roll-outs by 2025. This would also attract more data

center facilities and investment opportunities to leverage the developed conditions in Germany during the forecast period.

Germany Data Center Industry Overview

The Germany Data Center Market is moderately consolidated, with the top five companies occupying 58.36%. The major players in this market are CyrusOne Inc., Digital Realty Trust Inc., Equinix Inc., Iron Mountain Incorporated and NTT Ltd (sorted alphabetically).

Additional Benefits:

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

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