Denmark Data Center - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts (2026 - 2031)

Market Report | 2026-02-09 | 126 pages | Mordor Intelligence

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Report description:

Denmark Data Center Market Analysis

The Denmark Data Center Market was valued at USD 1.68 billion in 2025 and estimated to grow from USD 1.87 billion in 2026 to reach USD 3.24 billion by 2031, at a CAGR of 11.58% during the forecast period (2026-2031). In terms of the IT load capacity, the market is expected to grow from 556.10 megawatts in 2025 to 896.90 megawatts by 2030, at a CAGR of 10.03% during the forecast period (2025-2030). The market segment shares and estimates are calculated and reported in terms of MW. Rapid renewable-power deployment, 5G ubiquity, subsea cable landings, and fast-track permitting together create a virtuous cycle that draws global hyperscale and AI workloads to Denmark. Hyperscale operators capitalize on 95% very-high-capacity network coverage and 98% 5G coverage to position the country as a Nordic gateway for latency-sensitive cloud traffic. Robust corporate power-purchase-agreement activity and heat-reuse mandates underpin long-term sustainability commitments, while public-private investments such as the Gefion AI supercomputer showcase Denmark's ability to host high-density infrastructure. Grid constraints and strict excess-heat price caps temper the outlook, yet policy tools continue to counterbalance these headwinds.

Denmark Data Center Market Trends and Insights

Cloud and AI-driven hyperscale expansion

Gefion, the first Danish AI supercomputer running 1,528 NVIDIA H100 GPUs, exemplifies infrastructure requirements that are

three-to-five times more power-dense than typical enterprise racks. Public-private funding models, such as Novo Nordisk Foundation's DKK 600 million grant and state-backed EIFO financing, validate Denmark's ability to attract specialized capital. Operators integrate direct-to-chip liquid cooling and 100% renewable contracts to meet EU sustainability rating schemes that became mandatory in September 2024. The resulting technical and environmental credentials solidify the Denmark data center market as a preferred AI deployment zone for global cloud providers.

Renewable-power advantage and heat-reuse mandates

The North Sea Energy Island aims to aggregate 10 GW of offshore wind and dedicate export transmission, giving hyperscale facilities an opportunity for direct renewable sourcing. Operators such as TDC NET already exported 2,516 MWh surplus heat into district systems in 2023, proving circular-economy feasibility. The Green Investment Support Scheme allocates DKK 657 million in 2025, covering up to 15% of the costs associated with establishing renewable technology. Binding heat-reuse clauses in industrial-park zoning reinforce Denmark's reputation for sustainable digital infrastructure, a differentiator against competing European hubs.

Looming grid capacity deficit and offshore wind delays

Total data-center power draw, now 2 TWh, could quadruple by 2030, stressing substations and high-voltage corridors in Greater Copenhagen. While the 10 GW Energy Island provides a future remedy, construction timetables lag immediate capacity requirements. Klimaradet warns that an additional two offshore-wind parks are needed to keep pace with demand. Transmission upgrades compete with residential electrification projects, prolonging queue times for new grid connections and tempering near-term build-out for the Denmark data center market.

Other drivers and restraints analyzed in the detailed report include:

5G and nationwide FTTP enabling edge demandGovernment tax incentives and fast-track permittingStrict excess-heat price-cap rules limiting ROI

For complete list of drivers and restraints, kindly check the Table Of Contents.

Segment Analysis

Massive sites held 39.10% of Denmark data center market share in 2025 and will compound at 12.05% through 2031 as operators chase scale efficiencies. The Denmark data center market size for massive facilities is set to expand by 287 MW over the forecast horizon, anchored by atNorth's 250 MW DEN02 campus in Olgod. These projects use economies of scale to absorb compliance and sustainability costs more effectively than medium sites.

Consolidation pressures will intensify as hyperscale buyers lock in capacity years ahead, leaving smaller facilities to specialize in edge or regulated workloads. NIS2 costs dilute margins for sub-50 MW operators, accelerating mergers or closures. However, edge services and content-delivery nodes will still need local footprints, giving agile providers a niche within an otherwise scale-driven Denmark data center market.

Tier 3 accounted for 49.80% of 2025 capacity, yet Tier 4 posts a 10.70% CAGR through 2031 as AI and BFSI applications demand 99.995% uptime. Denmark data center market size allocated to Tier 4 will rise sharply after Gefion set a reliability precedent for research supercomputing.

Redundant feeds, dual-powered chillers, and fault-tolerant architectures attract premium pricing and justify long-term corporate

PPAs. SMEs and dev-test use cases still fit Tier 2, but the strategic growth axis clearly favors higher tiers that can guarantee compliance with stringent digital-service-provider rules under NIS2.

The Denmark Data Center Market Report is Segmented by Data Center Size (Large, Massive, Medium, Mega, and Small), Tier Type (Tier 1 and 2, Tier 3, and Tier 4), Data Center Type (Hyperscale/Self-Built, Enterprise/Edge, and Colocation), End User (BFSI, IT and ITES, E-Commerce, Government, Manufacturing, Media and Entertainment, and More), and Hotspot. The Market Forecasts are Provided in Terms of IT Load Capacity (MW).

List of Companies Covered in this Report:

Apple Inc. Microsoft Corporation Google LLC Meta Platforms Inc. Digital Realty Trust Inc. STACK Infrastructure, Inc. GlobalConnect A/S atNorth ehf Cibicom A/S Fuzion A/S NNIT A/S Bulk Infrastructure Group AS Telia Company AB CenterServ Global

Additional Benefits:

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

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