

Data Center Rack Market in Europe - Industry Outlook and Forecast 2019-2024

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Abstracts

The Europe data center rack market is projected to reach revenues of approximately \$550 million by 2024, growing at a CAGR of around 7% during 2018–2024.

The Europe data center rack market is driven by the increasing adoption of hot/cold aisle containment systems among operators. The design and manufacture of innovative products that can withstand seismic activities and are available as soundproof enclosures will transform the Europe data center rack market.

In terms of shipments, the UK, Netherlands, Germany, Ireland, France, Denmark, Sweden, and Norway are dominating the Europe data center rack market. Hyperscale data center operators are also actively involved in the adoption of rack architecture designed through open communities such as OCP and Open 19.

The market research report on Europe data center rack market covers market sizing and forecast, market shares, industry trends, growth drivers, and vendor analysis. The market study includes insights on market segmentation by product (cabinets and accessories), size (below 42U, 42U, 45U and 47U, 48U, and other units), end-users (colocation providers and enterprise), and geography (Eastern Europe, Western Europe, and Nordic).

The report considers the present scenario of the Europe data center rack market and its market dynamics for the period 2018–2024. It covers a detailed overview of several market growth enablers, restraints, and trends. The study covers both the demand and supply sides of the market. It profiles and analyzes leading companies and several other prominent companies operating in the market.

Europe Data Center Rack Market Dynamics

The Europe data center rack market highly depends on the construction of new data centers. The market is aided by the increasing construction of modular and prefabricated data center spaces inside the office environment. The demand for IaaS will continue to grow among enterprise customers adopting public cloud and hybrid infrastructure services during the forecast period. In 2018, the Europe cloud computing market was estimated to be around \$20 billion. The demand for data center services such as colocation, managed services, and cloud-connectivity services will gain momentum as over 55% of firms in Europe use advanced cloud services for their financial and accounting software application.

Vertiv, HPE, Rittal, and Schneider Electric dominate the market due to their wide presence across geographies. The adoption of modern rack architecture will enable the mounting of multiple high-performance infrastructure. These architectures are crafted to provide optimized space and improved efficiency to operators. The vendors of Europe data center market are providing customer-centric operational and space requirement solutions. The enforcement of GDPR (General Data Protection Regulation) has increased the awareness about data protection among enterprises, which significantly has led to the adoption of cloud services in Europe and the trend is expected to continue in future.

Europe Data Center Rack Market: Segmentation

The market study includes insights on market segmentation by product, size, end-users, and geography.

The Europe data center rack market by products is classified into rack enclosure cabinets and accessories. The enclosure/cabinet segment dominated the market share in 2018, growing at a CAGR of more than 6% during the forecast period. The use of these cabinets to mount data centers critical and support infrastructure is increasing the growth of this segment in the Europe data center rack market. Open frame racks are predominantly adopted to equip network infrastructure such as switches, while cabinets are offered as servers and network cabinets by vendors. Open frame rack infrastructure and rack enclosures are two different types of cabinets.

The Europe data center rack market by rack size is segmented into below 42U, 42U, 45U & 47U, 48U, and other units. The 42U segment occupied nearly half of the market share in 2018. The 42U rack adoption highly depends on the service provider and

customer preference. Vendors are also continually innovating their 42U racks offerings with over 80% proliferation as well as deeper and wider racks for better airflow and cable management. This segment also includes the adoption of racks based on the OCP design to hyperscale providers. In addition, SMEs with limited computing requirements prefer racks below 42U.

Colocation providers and enterprises are the largest end-users of the Europe data center rack market. Colocation data centers are the dominating segment, which is growing at a CAGR of more than 7%. The colocation of wholesale facilities is expected to increase the demand for data centers construction. Europe is likely to receive continuous investment from colocation providers such as Equinix, Digital Realty, CyrusOne, Interxion, NTT, and Global Switch.

Market Segmentation by Products

- Rack Cabinets

- Accessories

Market Segmentation by Rack Size

- Below 42U

- 42U

- 45U & 47U

- 48U

- Other Rack Units

Market Segmentation by End-user

- Colocation Providers

- Enterprises

Europe Data Center Rack Market: Geography

The Europe data center rack market by geography is categorized into Eastern Europe, Western Europe, and Nordic. Western Europe witnessed significant investments in 2018, with multiple projects carried out by colocation, cloud, telecommunication, and internet service providers in the UK, Germany, France, Ireland, Spain, Italy, Netherlands, Switzerland, Portugal, and Austria. In Ireland, hyperscale data center providers such as Facebook have set up large-scale data centers and have announced expansion plans in the coming years. Also, the market witnessed an increase in M&A activities by Equinix, ST Telemedia, and CyrusOne.

The Nordic region has emerged as a highly sought-after location in the last few years as it has attracted foreign investment from hyperscale computing companies such as Apple, Facebook, and AWS. Local and global service providers such as GlobalConnect, Equinix, Interxion.

Market Segmentation by Geography

Eastern Europe

Germany

France

Italy

Western Europe

Russia

Czech Republic

Poland & Russia

Other Countries

Nordic

Denmark

Norway

Sweden

Finland & Iceland

Key Vendor Analysis

The Europe data center rack market is witnessing partnerships between vendors and facilities operators, thereby driving the competition in the market. The construction of modular and prefabricated facility spaces is creating lucrative opportunities for leading players operating in the market. Companies are focusing on expanding their product portfolios, reducing expenditure, increasing warranty, providing additional services to sustain the intense competition in the market. The incorporation of innovative solutions such as rack-level UPS systems, PDUs, rack-level security systems, Ethernet cabling, and others will increase the competition and boost revenues in the Europe data center rack market. The increase in system scale high-performance computing infrastructure offerings will enable vendors to attract new consumers and increase the market share during the forecast period.

Major Vendors in Europe Data Center Rack Market:

Black Box Network Services

Overview

Product Offerings

Key News

Eaton

Hewlett PackardEnterprise (HPE)

Rittal

Schneider

Vertiv

Other Prominent Vendors

Beijing Finen Electronic Equipment

Overview

Product Offerings

Belden

Cannon Technologies

C&F Group

Chatsworth

Conteg

Dataracks

Delta Power Solutions

Fujitsu

Great Lakes Case & Cabinet

Huawei

Legrand

Oracle

Panduit

Prism Enclosures

Rack Solutions

Retex

Schroff (nVent)

Tripp Lite

Usystems

Key Market Insights

1. An analysis of Europe data center rack market in terms of market sizing and growth opportunities for the forecast period 2018–2023
2. Comprehensive insights into current industry trends, market forecast, and growth drivers about the Europe data center rack market
3. Discussion on the latest analysis of market enablers, growth drivers, challenges, and investment opportunities
4. A complete overview of market segments and the regional outlook of the Europe data center rack market
5. A detailed overview of the vendor landscape, competitive analysis, and key market strategies to gain competitive advantage.

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