

Nordic Data Center Construction Market - Industry Outlook and Forecast 2018-2023

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Abstracts

This market research report on Nordic data center construction market offers analysis on market size & forecast, market share, industry trends, growth drivers, and vendor analysis. The market study also includes insights on segmentation by electrical construction (UPS systems, generators, transfer switch and switchgear, rack PDU, and other electrical infrastructure), by mechanical construction (cooling systems, rack, and other infrastructure), by general construction (building development, installation and commissioning, services, building design, physical security, and DCIM), and by country (Denmark, Finland, Iceland, Norway, and Sweden).

Nordic Data Center Construction Market - Overview

Availability of renewable energy source and favorable climatic conditions in countries such as Sweden, Norway, Finland, and Denmark are attributing to the growth of the Nordic data center construction market. The growing adoption of connected devices across vehicles, buildings, industrial process, and infrastructure industries in Nordic region will augment the demand for cloud and big data services resulting in the construction of new facilities in the region. The increasing investments made by telecommunication companies such as Ericsson, TeliaSonera, Telenor, Tele2, and TDC Group in submarine fiber cable projects will create lucrative opportunities for operators in the Nordic region. The increasing government efforts to improve the digital economy and using renewable energy sources to reduce operating costs will transform the market in this region. The installation of submarine cables through the North Sea, Baltic Sea and North Atlantic Ocean will increase the connectivity between Nordic countries and European region. The rising number of development projects by hyperscale operators such as Facebook, Apple, Google, Amazon Web Service, and Microsoft will significantly improve the economy of the countries in the Nordic market. The demand for

public cloud and hybrid infrastructure services will create demand for colocation and managed hosting facilities in the Nordic region. Major colocation and managed service providers investing millions of dollars in the Nordic region include Equinix, Interxion, TeliaSonera, GlobalConnect, Hydro66, Multigrid, EcoDataCenter, Lefdal Mine Data Center, HETZNER, and Tieto.

Countries such as Denmark, followed by Sweden, Finland, Norway, and Iceland are the major countries promoting the development of the market in the Nordic region. The infrastructure vendors are designing and developing effective power and cooling systems which will reduce the carbon emissions to almost zero and promote sustainable operations of the facility in the Nordic market. The Nordic data center construction market is estimated to reach revenues of approximately \$6 billion by 2023, growing at a CAGR of more than 8% during 2017-2023. The market size of this region is also provided by square ft. area and power capacity in MW.

Nordic Data Center Construction Market - Dynamics

The ability to reduce OPEX of facilities cooling through district heating technology will propel the growth of the Nordic data center construction market. Data centers are the largest power consumers and major contributor to the greenhouse gas emissions in the region. The use of district heating can help operators recycle the heat emitted by facilities to redistribute it to district homes in winter in the Nordic region. The concept of district heating is gaining immense popularity in the Nordic region as facilities operators and government bodies are working together to promote these schemes in the market. In 2009, Academia in Finland was built to use waste heat for cooling nearby homes. Recently, Fortum Värme, City of Stockholm, Ellevio, and Stokab has partnered for an initiative namely, Stockholm Data Parks to invest in the deployment of more projects in the region. The development of projects supplying waste heat for district heating will transform the Nordic data center construction market during the forecast period.

Nordic Data Center Construction Market - Segmentation

This market research report includes a detailed segmentation of the market by electrical construction, mechanical construction, general construction, and country.

Nordic Data Center Construction Market – By Electrical Construction

The construction of mega facilities in the region will involve procurement of high capacity UPS systems and generator typically over 500kVA during the forecast period

The Nordic data center construction market by electrical construction is segmented into UPS systems, generators, transfer switch and switchgear, rack PDU, and other electrical infrastructure. The UPS segment dominated a significant market share in 2017, growing at a CAGR of around 9% during the forecast period. Most of the hyperscale projects will involve flexible design supporting of up to Tier 4 standards with 2N+1 redundancy in electrical infrastructure. The adoption of diesel rotary uninterruptible power supply (DRUPS) systems is gaining immense popularity in the Nordic data center construction market. These systems are designed to combine both battery and flywheel UPS topology and a diesel generator to provide backup power during outages. The high reliability, efficiency, and minimum maintenance are some of the major factors boosting the demand for these generators in the region.

Nordic Data Center Construction Market – By Mechanical Construction

The use of free cooling chillers, evaporative/adiabatic cooler will dominate the market, whereas water-based cooling for district heating will continue to grow during the forecast period

The mechanical construction segment in the Nordic data center construction market is categorized into cooling systems, rack, and other infrastructure. Racks occupied a considerable market share in 2017, growing at a CAGR of approximately 9% during the forecast period. The adoption of pre-assembled infrastructure along with rack PDUs, rack-level UPS, and IT infrastructure is gaining popularity in the Nordic data center construction market. The rise in the number of POD facilities that comprises from 1 to 20 rack units with pre-installed power and cooling infrastructure will augment the development of this segment in the Nordic data center construction market. These containment systems contain two formations that include hot aisle and cold aisle systems. The 42U rack unit is most commonly used in Nordic data centers. In recent years, rack units of 45U, 47U and 48U are installed in large facilities and the Nordic data center construction market is also witnessing a trend of using racks of different sizes in one facility in the Nordic region. Innovations in rack systems will improve productivity and efficiency of facilities in the Nordic region over the next few years.

Nordic Data Center Construction Market – By General Construction

Physical security with the sensor and video surveillance to gain traction in the Nordic data center construction market during the forecast period

The Nordic data center construction market by general construction is classified into building development, installation and commissioning, services, building design, physical security, and DCIM. There are over 40 investment location for facilities development in Finland and Stockholm Data Parks will enable the growth of greenfield developments in the region. There are also many multiple pre-approved sites in the country to complete construction within a year. Physical security segmented dominated a substantial market share in 2017, growing at an impressive CAGR of around 10% during the forecast period. The different layers of physical security systems in facilities consist of perimeter security, building security, data hall security, and rack-level security. The use of sensors integrated with DCIM solutions for real-time remote monitoring benefits will propel the demand for solutions in this segment in the Nordic data center construction market. The operators in the Nordic region are offering video surveillance analytics, modern centers protected from EMP and lightning during natural disasters, and innovative connected security products to attract new consumers and gain a larger market share. The increasing use of robot monitoring systems in the facility, with the sensor and video surveillance, will revolutionize the Nordic data center construction market during the forecast period.

Nordic Data Center Construction Market – By Country

Denmark's reduce electricity tax rates to propel development in the Nordic data center construction market during the forecast period

The country segmentation in the Nordic data center construction market is divided into Denmark, Finland, Iceland, Norway, and Sweden. Denmark dominated over half of the market share in 2017, growing at a CAGR of more than 4% during the forecast period. The increasing investment by hyperscale operators such as Facebook, Bulk Infrastructure, and Google on the Havfrue/AEC-2 submarine fiber cable will fuel the growth of this region in the Nordic market. Furthermore, the presence of multiple colocation providers such as Colt Technology Services, Interxion, TeliaSonera, and CenturyLink, will boost revenues in Denmark during the forecast period. The increasing adoption of cloud-based services across the country and Denmark's close proximity to other European countries will help vendors expand their businesses in the Nordic market. The Stockholm Data Park initiative has the potential to grow facilities investment in Sweden over the next few years.

Key Vendor Analysis

The Nordic data center construction market is driven by the increasing number of

greenfield and modular facilities deployment in the region. The multiple innovations focused on reducing power consumption, water consumption, and carbon dioxide emissions will create new opportunities for leading vendors in the Nordic market. The development of energy-efficient infrastructure will help prominent players gain larger market share in the Nordic region. The growing demand for higher capacity systems in redundancy configuration of 2N for power infrastructure across multiple facilities will create lucrative opportunities for top companies in the Nordic data center construction market.

The major vendors in the market are:

By Infrastructure Provider

ABB

Eaton

Rittal

Schneider Electric

STULZ

Vertiv

By Construction Contractor

AECOM

DPR Construction

HDR Architecture

MACE Group

Mercury Engineering

NCC

Skanska

Other prominent vendors include Airedale Air Conditioning, Alfa Laval, Caterpillar, Condair Group, Cummins, GE, HPE, Huawei, MTU On Site Energy, Socomec Group, Systemair, Swegon, Arup Group, AFEC International, Bravida, COWI, Dornan, ENACO, Etix Everywhere, Flex Enclosure, Fortis Construction, Granlund, MTH GROUP, Ramboll, Royal HaskoningDHV, SRV Group, and Sweco.

Key market insights include

1. The analysis of Nordic data center construction market provides market size and growth rate for the forecast period 2018-2023.
2. It offers comprehensive insights on current industry trends, trend forecast, and growth drivers about the Nordic data center construction market.
3. The report provides the latest analysis of market share, growth drivers, challenges, and investment opportunities.
4. It offers a complete overview of market segments and the regional outlook of the Nordic data center construction market.
5. The report offers a detailed overview of the vendor landscape, competitive analysis, and key market strategies to gain competitive advantage.

The Nordic data center construction market size is expected to reach revenues of around \$6 billion by 2023, growing at a CAGR of more than 8% 2018–2023.

The Nordic data center construction market is driven by the development of hyperscale facilities spanning over 200,000 square feet and rack power density of up to 40kW. The deployment of modular facilities integrated power and cooling components into containment solutions or rack-level modular solutions will transform the Nordic data center construction market. The market research report provides in-depth market analysis and segmental analysis of the Nordic data center construction market by product, distribution channel, material, and geography.

Base Year: 2017

Forecast Year: 2018–2023

The report considers the present scenario of the Nordic data center construction market

and its market dynamics for the period 2018?2023. It covers a detailed overview of various market growth enablers, restraints, and trends. The study covers both the demand and supply sides of the market. It also profiles and analyzes the leading companies and various other prominent companies operating in the Nordic data center construction market.

Major Vendors in the Nordic Data Center Construction Market

By Infrastructure Provider

ABB

Eaton

Rittal

Schneider Electric

STULZ

Vertiv

By Construction Contractor

AECOM

DPR Construction

HDR Architecture

MACE Group

Mercury Engineering

NCC

Skanska

Prominent Players in the Nordic Data Center Construction Market

By Infrastructure Provider

Airedale Air Conditioning

Alfa Laval

Caterpillar

Condair Group

Cummins

GE

HPE

Huawei

MTU On Site Energy

Socomec Group

Systemair

Swegon

By Construction Contractor

Arup Group

AFEC International

Bravida

COWI

Dornan

ENACO

Etix Everywhere

Flex Enclosure

Fortis Construction

Granlund

MTH GROUP

Ramboll

Royal HaskoningDHV

SRV Group

Sweco

Market Segmentation by Electrical Construction

UPS systems

Generators

Transfer Switch and Switchgear

Rack PDU

Other Electrical Infrastructure

Market Segmentation by Mechanical Construction

Cooling Systems

Rack

Other Infrastructure

Market Segmentation by Cooling Systems

CRAC & CRAH Systems

Chillers

Cooling Towers & Dry Coolers

Economizer & Evaporative Coolers

Other Cooling Units

Market Segmentation by Cooling Technique

Air-based Cooling Technique

Liquid-based Cooling Technique

Market Segmentation by General Construction

Building Development

Installation & Commissioning

Building Design

Physical Security

DCIM

Market Segmentation by Geography

Denmark

Finland

Iceland

Norway

Sweden

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