

Spain Data Center Market - Investment Analysis and Growth Opportunities 2021-2026

<https://marketpublishers.com/r/S433BBCF84C5EN.html>

Date: June 2021

Pages: 89

Price: US\$ 2,500.00 (Single User License)

ID: S433BBCF84C5EN

Abstracts

In-depth Analysis and Data-driven Insights on the Impact of COVID-19 Included in this Spain Data Center Market Report

Spain data center market to witness a CAGR of 5.40% during the period 2021-2026

Spain data center is emerging market witnessing an increase in investments during the forecast period. Major cloud service providers like Microsoft, Google and Amazon Web Services are also investing in the country. Around nine data center facilities are expected to be operational in the next 2-3 years. According to Uptime Institute, over 14 data center facilities are certified Tier III in the country. The Spain data center market has grown significantly, with an increase in hyperscale data center development and investment by cloud service providers. The increasing internet penetration across Spain is creating lucrative opportunities for the players to grow and expand their business presence in the country.

The report considers the present scenario of the Spain data center market and its market dynamics for the forecast period 2021-2026. It covers a detailed overview of several growth enablers, restraints, and trends in the market. The study includes the demand and supply aspect of the market.

KEY HIGHLIGHTS OF THE REPORT

In 2019, Amazon Web Service (AWS) announced a renewable energy project in Spain, enabling a power capacity of 149 MW.

In Spain, the cloud computing market is expected to grow at around 13% CAGR

reaching USD 4.1 billion by 2026.

DATA4, NTT, Equinix, Digital Realty (Interxion), and Nabiax are the few major data center investors in Madrid.

Spain is witnessing greenfield construction that will bring in strong revenue for the construction vendors.

Merlin Properties has planned a 20 MW data center in Barcelona and Bilbao.

In recent years, the use of 45U-48U rack units is witnessing growth in the Spain data center market and is expected to grow during the forecast period.

SPAIN DATA CENTER MARKET INSIGHTS

The growing adoption of cloud-based services and enterprise digitalization involving migration of on-premises facilities will enable the colocation services market growth in Spain during 2021-2026.

The internet penetration in Spain stood at 91% in 2021. The increasing usage of the internet creates more data traffic, which aids in the country's growth of data center facilities.

The entry of cloud service providers like Microsoft and AWS boosts data center investments in the country.

Spain is likely to invest over USD 5 billion on 5G technology and broadband coverage by 2025.

Merlin Properties and Edged Energy have planned to construct three facilities in Madrid, Barcelona, and Bilbao. It is estimated to add over 85,000 square feet of data center space per facility.

The Spanish Government has set to install 50 GW of renewable energy by 2030 as part of its National Integrated Energy and Climate Plan.

In 2020, the Spanish Government announced an investment of USD 720 million in developing Artificial Intelligence to incorporate in the data center market.

All-flash storage providers such as DELL, HPE, IBM, and Lenovo have a strong market share.

SPAIN DATA CENTER VENDOR LANDSCAPE

The Spain data center market has several IT infrastructure providers, construction contractors, support infrastructure providers, and investors. Atos, Broadcom, Cisco System, Dell Technologies, Fujitsu, Hewlett Packard Enterprise (HPE), IBM, Juniper Networks, Lenovo are the major vendors in the IT infrastructure market. New players are entering the Spain data center market owing to the growth opportunities. Equinix, Digital Realty (Interxion), Adam Ecotech, Nabiax, Colt DCS, and Global Switch are among the prominent providers operating in the colocation market.

IT Infrastructure Providers

Atos

Broadcom

Cisco System

Dell Technologies

Fujitsu

Hewlett Packard Enterprise (HPE)

IBM

Juniper Networks

Lenovo

Data Center Construction Contractors & Sub Contractors

Arup

ARSMAGNA

EYP Mission Critical Facilities

Ferrovial

IDOM

ISG

Mercury Engineering

Quark

PQC Power Quality Control

Aeon Engineering

Support Infrastructure Providers

ABB

Caterpillar

Cummins

Delta Electronics

Eaton

Gesab

Legrand

Piller Power Systems

Rolls-Royce Power Systems

Rittal

Schneider Electric

STULZ

Vertiv Group

Data Center Investors

Aire Networks

DATA4

AWS (Amazon Web Services)

Digital Realty

EQT Infrastructure (EdgeConneX)

Equinix

NTT Global Data Centers

Nabiax

REPORT COVERAGE

This report offers analysis on the Spain Data Center market share and in-depth analysis of the existing and upcoming facilities, datacenter investments in terms of IT, electrical, mechanical infrastructure, general construction, and geography. It discusses sizing and estimation for different segments to the investment in data centers. The segmentation includes:

EXISTING VS. UPCOMING FACILITIES

Existing Facilities in the region (Area and Power Capacity)

Madrid

Barcelona

Seville

Bilbao

Other Locations

List of Upcoming Facilities in the region (Area, Power Capacity, and Cities)

SPAIN DATA CENTER INVESTMENT COVERAGE

Infrastructure Type

IT Infrastructure

Electrical Infrastructure

Mechanical Infrastructure

General Construction

IT Infrastructure

Servers

Storage Systems

Network Infrastructure

Electrical Infrastructure

UPS Systems

Generators

Transfer Switches & Switchgears

PDU's

Other Electrical Infrastructure

Mechanical Infrastructure

Cooling Systems

Rack Cabinets

Other Mechanical Infrastructure

Cooling Systems

CRAC & CRAH Units

Chillers

Cooling Towers, & Condensers, and Dry Coolers

Economizers & Evaporative Coolers

Other Cooling Units

General Construction

Building Development

Installation & Commissioning Services

Building & Engineering Design

Physical Security

Data Center Infrastructure Management (DCIM)

Tier Standard

Tier I & Tier II

Tier III

Tier IV

Geography

Madrid

Other Cities

WHY SHOULD YOU BUY THIS RESEARCH?

Market size is available in terms of area, power capacity, investment, and colocation revenue.

An assessment of the Spain data center investment in the market by colocation, hyperscale, and enterprise operators.

Data center investments in terms of area (square feet) and power capacity (MW) across cities.

A detailed study of the existing Spain data center market landscape, an in-depth industry analysis, and insightful predictions about the Spain data center market size during the forecast period.

Snapshot of existing and upcoming third-party facilities in Spain

Facilities Covered (Existing): 35

Facilities Identified (Upcoming): 9

Coverage: 5+ Cities

Existing vs. Upcoming (Data Center Area)

Existing vs. Upcoming (IT Load Capacity)

Data center colocation market in Spain

Market Revenue & Forecast (2020-2026)

Retail Colocation Pricing

Wholesale Colocation Pricing

Classification of the Spain data center market investments into multiple segments and sub-segments (IT, power, cooling, and general construction services) with market sizing and forecast.

A comprehensive analysis of the latest trends, growth rate, potential opportunities, growth restraints, and prospects for the market.

Business overview and product offerings of prominent IT infrastructure providers, construction contractors, support infrastructure providers, and investors operating in the market

A transparent research methodology and the analysis of the demand and supply aspect of the market

KEY QUESTIONS ANSWERED:

1. How big is the Spain data center market?
2. How many existing data centers are there in Spain?
3. What are the expected upcoming facilities in Spain during the period 2021–2026?
4. What is the growth rate of Spain's data center colocation market?
5. What are the factors driving the market growth in the country?

Contents

CHAPTER 1 : EXISTING & UPCOMING THIRD-PARTY DATA CENTERS IN SPAIN

40+ UNIQUE DATA CENTER PROPERTIES

Data Center IT Load Capacity

Data Center White Floor Area Space

Existing Vs Upcoming Data Center Capacity by Locations

o Madrid

o Barcelona

o Other Locations

CHAPTER 2: INVESTMENT OPPORTUNITIES IN SPAIN

Data Center Investments

Investment by Area

Investment by Power Capacity

CHAPTER 3: DATA CENTER COLOCATION MARKET IN SPAIN

Retail vs Wholesale Data Center Colocation

Colocation Pricing (Quarter Rack, Half Rack, Full Rack) & Add-ons

Wholesale Colocation Pricing

CHAPTER 4: MARKET DYNAMICS

Market Drivers

Market Trends

Market Restraints

CHAPTER 5: MARKET SEGMENTATION

IT Infrastructure: Market Size & Forecast

Electrical Infrastructure: Market Size & Forecast

Mechanical Infrastructure: Market Size & Forecast

General Construction Services: Market Size & Forecast

CHAPTER 6: TIER STANDARD

Tier I & II
Tier III
Tier IV

CHAPTER 7: GEOGRAPHIC SEGMENTATION

Madrid
Other Cities

CHAPTER 8: KEY MARKET PARTICIPANTS

IT Infrastructure Providers
Construction Contractors
Support Infrastructure Providers
Data Center Investors

CHAPTER 9: APPENDIX

Market Derivation
Quantitative Summary

List Of Exhibits

LIST OF EXHIBITS

- Exhibit 1 Third-Party Data Centers Snapshot
- Exhibit 2 Third-Party Data Center Snapshot by Locations
- Exhibit 3 Area Developed by Locations (thousand square feet)
- Exhibit 4 Power Capacity by Locations (MW)
- Exhibit 5 Data Center Market Size & Forecast by Investment (\$ Million)
- Exhibit 6 Data Center Market Size & Forecast by Area 2020?2026 (Million Square Feet)
- Exhibit 7 Market Size & Forecast by Power Capacity 2020?2026 (MW)
- Exhibit 8 Data Center Colocation Service Revenue: Market Size & Forecast by 2020?2026 (\$ Million)
- Exhibit 9 Retail Colocation Pricing 2020
- Exhibit 10 Wholesale Colocation Pricing 2020
- Exhibit 11 Market Size & Forecast by IT Infrastructure 2020?2026 (\$ Million)
- Exhibit 12 Market Size & Forecast by Electrical Infrastructure 2020?2026 (\$ Million)
- Exhibit 13 Market Size & Forecast by Mechanical Infrastructure 2020?2026 (\$ Million)
- Exhibit 14 Market Size & Forecast by Cooling Systems 2020?2026 (\$ Million)
- Exhibit 15 Market Size & Forecast by General Construction 2020?2026 (\$ Million)
- Exhibit 16 Market Size & Forecast by Tier Standards 2020?2026 (\$ Million)
- Exhibit 17 Market Size & Forecast in Madrid by Investment 2020?2026 (\$ Million)
- Exhibit 18 Market Size & Forecast in Madrid by Area 2020?2026 (Million Square Feet)
- Exhibit 19 Market Size & Forecast in Madrid by Power Capacity 2020?2026 (MW)
- Exhibit 20 Market Size & Forecast in Other Cities by Investment 2020?2026 (\$ Million)
- Exhibit 21 Market Size & Forecast in Other Cities by Area 2020?2026 (Million Square Feet)
- Exhibit 22 Market Size & Forecast in Other Cities by Power Capacity 2020?2026 (MW)

List Of Tables

LIST OF TABLES

Table 1 12. List of Upcoming Data Center Projects

Table 2 Data Center Site Selection Criteria

Table 3 Overall Market Size & Forecast 2020?2026

Table 4 Market Size & Forecast by Infrastructure 2020?2026 (\$ Million)

Table 5 Market Size & Forecast by IT Infrastructure 2020?2026 (\$ Million)

Table 6 Market Size & Forecast by Electrical Infrastructure 2020?2026 (\$ Million)

Table 7 Market Size & Forecast by Mechanical Infrastructure 2020?2026 (\$ Million)

Table 8 Market Size & Forecast by Cooling Systems 2020?2026 (\$ Million)

Table 9 Market Size & Forecast by General Construction 2020?2026 (\$ Million)

Table 10 Investment Market Size & Forecast by Madrid 2020?2026

Table 11 Investment Market Size & Forecast by Other Cities 2020?2026

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