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Europe HVO for Data Center Backup Market: Focus on Data Center Type, Feedstock Type, and Country - Analysis and Forecast, 2025-2034

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Abstracts

This report can be delivered in 2 working days.

Introduction to Europe HVO for Data Center Backup Market

The Europe HVO for data center backup market was valued at $6,699.9 thousand in 2024 and is projected to grow at a CAGR of 10.42%, reaching $21,672.1 thousand by 2034. The market for hydrotreated vegetable oil (HVO) for data centre backup power is expanding in Europe as data centres look for low-emission, environmentally friendly substitutes for traditional diesel. Reliable and eco-friendly backup solutions are becoming more and more necessary as our reliance on cloud services and digital infrastructure increases. HVO provides a renewable fuel drop-in alternative that guarantees continuous power while drastically lowering lifecycle carbon emissions.

Fuel efficiency, storage life, and overall system performance are being improved by developments in HVO production and integration with contemporary energy systems. Important industry participants are actively investing in increasing HVO supply and capacity throughout Europe, including Neste, TotalEnergies, Repsol, ENI S.p.A., and Phillips 66..

Stricter EU climate rules, business sustainability objectives, and mounting pressure to decarbonise data centre operations are all influencing this industry. Data centre operators are therefore increasingly using HVO as a scalable, affordable, and climate-aligned backup power option. The European HVO industry is still growing quickly, which helps the continent's overall shift to a more environmentally friendly digital economy.

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Market Introduction

In the field of digital infrastructure, the European market for hydrotreated vegetable oil (HVO) for data centre backup power is becoming a major facilitator of sustainable energy practices. Reducing the environmental impact of data centres, especially in backup power production, is becoming more and more important as their capacity and significance grow. As a cleaner alternative to diesel generators, many European operators are switching to HVO, a renewable, biodegradable fuel made from waste oils and fats.

Reduced greenhouse gas emissions, improved combustion efficiency, and compatibility with current diesel engines are just a few of the many benefits that make HVO a perfect retrofit. It meets operational reliability requirements since it works well in cold regions and may be stored for long periods of time without degrading. Regional environmental objectives, governmental challenges, and expanding business commitments to carbon neutrality all promote the change.

HVO is being more widely used in data centre applications throughout Europe, including Sweden, the Netherlands, Germany, and the UK. To guarantee continuous quality and sustainable sourcing, industry participants are investing in specialised supply chains and certification regimes. HVO is positioned to be a key player in Europe's shift to low-emission digital infrastructure as the need for green backup power grows.

Market Segmentation:

Segmentation 1: by Data Center Type

Colocation and Retail

Hyperscale Data Center

Others

Segmentation 2: by Data Center Type

Edible Vegetable Oils

Crude Palm Oil

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- Used Cooking Oil
- Tall Oil
- Animal Fats
- Others
  - Non-Edible Vegetable Oil
  - Sludge Palm Oil Mill Effluent
  - Others

Segmentation 3: by Region

- Europe

Europe HVO for Data Center Backup Market Trends, Drivers and Challenges

Trends

- Growing adoption of HVO in backup generators across European data centers
- Compatibility with existing diesel engines without requiring modifications
- Enhanced fuel stability allows long-term storage with minimal microbial contamination
- Use of HVO aligning with data centers' carbon-neutral and green energy strategies

Drivers

- Significant reduction in lifecycle carbon emissions compared to fossil diesel

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- Easy integration as a “drop-in” fuel, reducing the need for infrastructure changes
- Supports ESG goals and simplifies carbon reporting for operators
- Regulatory pressure and green certification incentives encouraging sustainable backup solutions

Challenges

- Limited feedstock availability may lead to supply constraints and reliance on less sustainable sources
- Higher cost per liter than conventional diesel, impacting operational budgets
- Sustainability concerns related to feedstock origin, such as palm oil or virgin oils
- Competition from emerging backup solutions like hydrogen fuel cells and battery storage systems

How can this report add value to an organization?

Product/Innovation Strategy: The product segment helps the reader understand the different types of products available regionally. Moreover, the study provides the reader with a detailed understanding of the Europe HVO for data center backup market by products based on category and preparation.

Growth/Marketing Strategy: The Europe HVO for data center backup market has seen major development by key players operating in the market, such as business expansion, partnership, collaboration, and joint venture. The favored strategy for the companies has been synergistic activities to strengthen their position in the Europe HVO for data center backup market.

Competitive Strategy: Key players in the Europe HVO for data center backup market have been analyzed and profiled in the study of HVO for data center backup products. Moreover, a detailed competitive benchmarking of the players operating in the Europe

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HVO for data center backup market has been done to help the reader understand how players stack against each other, presenting a clear market landscape. Additionally, comprehensive competitive strategies such as partnerships, agreements, and collaborations will aid the reader in understanding the untapped revenue pockets in the market.

Key Market Players and Competition Synopsis

Profiled companies have been selected based on thorough secondary research, which includes analyzing company coverage, product portfolio, market penetration, and insights gathered from primary experts.

Some prominent names established in this market are:

- HVO Manufacturers
  - Neste
  - Repsol
  - TotalEnergies
  - ENI S.p.A.
- HVO Suppliers
  - Crown Oil
  - Certas Energy
  - LubiQ HVO Fuels
- HVO Generator Manufacturers
  - Rolls Royce
  - Baudouin

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