

Austria Data Center - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts (2024 - 2029)

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Abstracts

The Austria Data Center Market size is estimated at 139.7 MW in 2024, and is expected to reach 215 MW by 2029, growing at a CAGR of 9.00%. Further, the market is expected to generate colocation revenue of USD 237.2 Million in 2024 and is projected to reach USD 383.4 Million by 2029, growing at a CAGR of 10.08% during the forecast period (2024-2029).

Tier 4 data center accounted for majority share in terms of volume in 2023, and is expected to dominate through out the forecasted period

The tier 4 segment held 50% of the Austrian data center market in 2022. It is projected to register a CAGR of 21.44% to reach an IT load capacity of 13.08 MW by 2029. The tier 3 segment is expected to witness moderate growth of 3.75% till 2029. The implementation of high standards in the data center facilities ensures minimal downtime while increasing the efficiency of facilities. Therefore, these data centers with additional redundant equipment in place for backup are being preferred by customers.

Tier 1 & 2 facilities are recording slowing demand as they are not competent in fulfilling the businesses' growing need for uninterrupted services. The ever-increasing number of global conglomerates has given rise to business continuity services 24*7, gradually shifting the preference toward tier 3 and 4 data centers. For instance, in October 2022, Google announced its plans to set up cloud services in Austria with a data center. In June 2022, Microsoft announced its plans to spend EUR 1 billion on the construction of cloud infrastructure.

E-commerce is anticipated to gain traction during the forecast period. The COVID-19 pandemic was a significant driver of e-commerce expansion. Austrian consumers were restricted from making in-person purchases at pharmacies and supermarkets due to the countrywide lockdowns from 2020 to 2021, causing a steady growth of 20% in online retail sales volume, or USD 1.6 billion in 2021.

In 2021, 14% of all retail purchases made by Austrian households were online, with each shopper spending an average of USD 2,000 annually. Such instances may offer favorable conditions for the growth of tier 3 and 4 facilities in the country.

Austria Data Center Market Trends

Rise in the urban population and 5G access is boosting the market demand

The total number of smartphone users in the country was 7.8 million in 2022, and it is expected to witness a CAGR of 1.2% during the forecast period to reach 8.4 million users by 2029.

Smartphone users are rising due to the growing demand for mobile internet services and applications and the real-time need for information exchange. Consumer behavior has been impacted by the quick adoption of the Internet and smartphone technology in a variety of businesses. For instance, from 2016 to 2021, the purchasing power per person in Austria increased from 53,346 thousand to 54,121 thousand. As a result, more people were able to purchase smartphones, increasing the number of smartphone users.

The rise in the urban population increased consumer awareness regarding the usage of mobile devices. This, combined with the surging integration of AR technology, cashless payments, and expanding over-the-top (OTT) platform subscriptions, is expected to drive smartphone users in the future. Austria's urban population for 2021 was 5.2 million, a 0.86% increase from 2020. The urban population was 58.3% in 2018 and rose to 59.3% in 2022. Users in Austria see a better 5G experience in urban areas, with an average download speed of 162.3 Mbps. The abovementioned instances suggest the rising use of smartphones in Austria, which results in a constant increase in data. This necessitates a growing amount of storage space to accommodate the uncontrollable flow of data and the need for real-time processing and analysis. Data centers must manage the sheer amount of data. Thus, the requirement for extra racks in data centers

in Austria may increase as the number of smartphone users rises.

Surge in mobile phone and adoption of digital banking, social media usage increases the demand for the market

In 2022, the nation's average data speed was expected to be 63.05 Mbps. 3 (Drei) Austria began rolling out its 4G LTE network in 2014, and 4G availability reached 74.3% with a 27.84 Mbps download speed by 2017. Furthermore, by the end of 2020, 5G was launched in all provincial capitals. Since the launch of both of the services, 4G reached 89.6 Mbps in 2022, and 5G reached 162.4 Mbps by 2022.

3(Drei), A1 Telekom, and Magenta are the major players expected to shut down 3G by 2024. 2G is expected to outlive 3G and is expected to be shut down by 2030. The “5G strategy for Austria” document was approved in April 2018, and the service is expected to reach main traffic roads by the end of 2023, followed by nationwide coverage for two years.

The increased average speed and the overall connection are paving the way for end-users, such as e-commerce, media and entertainment, and online banking. For instance, the banking industry is mostly driven by the digital transformation of organizations. The country's growing mobile phone and high-speed internet markets influenced the early adoption of digital banking in Austria and are expanding steadily with the introduction of mobile banking and apps. Digital payments make up approximately EUR 10,000 million per year, and mobile payments are estimated at around EUR 2,192 million per year.

Additionally, the number of social media users in Austria was equivalent to 79.9% of the total population in January 2021, and it rose to 81.4% by the start of 2022. Daily social media usage totaled 90 minutes per day in Austria. Thus, the rise in mobile data speeds is expected to lead to more service-oriented applications in end-user industries, which are expected to drive the growth of data processing facilities in the coming years.

Austria Data Center Industry Overview

The Austria Data Center Market is moderately consolidated, with the top five companies

occupying 47.22%. The major players in this market are A1 Austria (A1 Telekom Austria Group), DATASIX GmbH, Interxion (Digital Reality Trust Inc.), Kontron AG and NTT Ltd (sorted alphabetically).

Additional Benefits:

The market estimate (ME) sheet in Excel format

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