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

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Abstracts

The Austria Data Center Power Market size is estimated at USD 88.10 million in 2024, and is expected to reach USD 126.70 million by 2029, growing at a CAGR of 8.19% during the forecast period (2024-2029).

The increasing demand for cloud computing among SMEs, government regulations for local data security, and growing investment by domestic players are some of the major factors driving the demand for data centers in the country.

Under Construction IT Load Capacity: The upcoming IT load capacity of the Austria data center market is expected to reach 200 MW by 2029.

Under Construction Raised Floor Space: The country's construction of raised floor area is expected to increase to 0.5 million sq. ft by 2029.

Planned Racks: The country's total number of racks to be installed is expected to reach 31,000 units by 2029. Vienna will likely house the maximum number of racks by 2029.

An increasing need for data storage has resulted in an upsurge in the number of data centers, and the rising usage of data centers has increased electricity consumption in the country. The country has made clear progress in increasing competition in electricity and natural gas markets. It has reduced the use of fossil fuels and increased the share of renewable energy.

The Austrian Federal Government adopted its Climate and Energy Strategy

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(#mission2030) in 2018. In line with the EU's objectives, this Strategy aims to achieve the Sustainable Development Goals for greenhouse gas reduction, renewables, and energy efficiency by 2030. To support the above policy and reduce energy consumption, key market players are focusing on introducing efficient power management systems such as PDUs, busways, and UPS to control unnecessary expenditures in data centers, which is expected to increase market growth.

Austria Data Center Power Market Trends

IT & Telecommunication Segment Holds the Major Share

The IT industry is one of the most rapidly expanding markets in the technology sector due to its ongoing development and the emergence of new trends each year. Many firms have recognized the necessity for digital adoption in their commercial activities, which the COVID-19 pandemic accelerated. More businesses are likely to use external support to adopt new technology solutions in a quick, contemporary, and creative way. For instance, in 2022, Google announced its set up of cloud services in Austria with a data center. In 2022, Microsoft announced spending EUR 1 billion (USD 1.07 billion) on the construction of its cloud infrastructure.

Further, Telcom 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 constantly increases 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 servers in data centers in Austria may increase as the number of smartphone users rises.

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 2023, and 5G reached 162.4 Mbps by 2023.

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The "5G strategy for Austria" document was approved in April 2018, and the service reached main traffic roads by the end of 2023, followed by nationwide coverage for two years.

More than 650,000 buildings are expected to have high-speed FTTH ("Fibre to the Home") internet connections owing to the investment of EUR 1 billion (USD 1.07 billion). Such developmental aspects are expected to complement the growth of the broadband network in the region and further substantiate the growth of servers and power infrastructure in the market.

Monitored PDUs Hold a Significant Share in the Market

The surging integration of AR technology, cashless payments, and expanding over-the-top (OTT) platform subscriptions are expected to drive the number of servers in data centers.

Further, increasing focus on digitalization, Internet penetration (reached 94.2% by the start of 2023, with a growth rate of 0.2% between 2022 and 2023), and e-commerce sales across the country create more need for storage facilities, resulting in huge demand for data centers and a rise in power consumption. Thus, the growing demand for data storage has led to deploying intelligent power distribution units (PDUs) against simple multi-socket rack installations with server and network equipment, which optimize power consumption in data centers.

Monitored rack PDUs are essential components in data center and server room infrastructure, providing real-time monitoring of power usage, voltage, current, and other electrical parameters. This data helps administrators make informed decisions about power allocation and capacity planning.

By tracking power usage trends, administrators can plan for future growth and ensure that power capacity is not exceeded, preventing overloads that could lead to equipment failures. Also, it helps identify inefficiencies and optimize energy usage. This can lead to cost savings and a reduced environmental footprint by eliminating unnecessary power consumption. Also, it allows administrators for remote access and control, reducing the need for physical presence and minimizing operational disruptions.

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Key players focused on introducing energy-efficient products into the market because of the above advancements and the necessity to reduce electricity consumption in the country. In May 2023, Eaton, which provides the power management service, launched G3 Universal Input Rack PDUs with dynamic C39 outlets capable of accommodating different plug configurations and input voltage requirements. To meet the most diverse data center rack power requirements, G3UPDU has added new features.

In May 2023, Legrand, a significant global provider of electrical and digital building infrastructures, introduced the next generation of intelligent rack PDUs PRO4X and Raritan PX4; these new intelligent rack PDU designs revolutionize capacity planning, environmental monitoring, physical and digital access control, workload optimization, and uptime initiatives. Such developments in the segment are predicted to boost the market growth over the forecast period.

Austria Data Center Power Industry Overview

The upcoming DC construction projects in the country would increase the demand for the Austrian data center power market in the coming years. The Austrian data center power market is moderately consolidated, with some players, including ABB Ltd, Eaton Corporation, Legrand Group, Vertiv Group Corp., and Schneider Electric SE. These major players, with a prominent market share, focus on expanding their regional customer base.

January 2024: Vertiv announced the plans to double its manufacturing capacity for busways, switchgear, and integrated modular solutions (IMS) by 2025. The expansion plans include increasing utilization and footprint in the United Arab Emirates, Ireland, South Carolina (United States), Mexico, Slovakia, and Northern Ireland.

December 2023: Eaton, an intelligent power management company, announced the launch of its new Rack PDU G4 (4th generation), which provides high security and a business continuity data center. It also combines with C39 outlets that securely connect C14 and C20 power cords, backed by a locking mechanism and a built-in high retention system to secure the power cord.

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