

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

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Abstracts

The Germany Data Center Storage Market size is estimated at USD 2.03 billion in 2024, and is expected to reach USD 2.49 billion by 2029, growing at a CAGR of 3.41% during the forecast period (2024-2029).

Key Highlights

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 German data center market is expected to reach more than 2300 MW by 2029.

Under Construction Raised Floor Space: The country's construction of raised floor area is expected to increase above 11 million sq. ft by 2029.

Planned Racks: The country's total number of racks to be installed is expected to reach above 5,88,000 units by 2029. Frankfurt is expected to house the maximum number of racks by 2029.

Planned Submarine Cables: There are close to 7 submarine cable systems connecting Germany, and many are under construction. In May 2023, German transmission system operator (TSO) 50Hertz and its partners in Estonia, Latvia, and Lithuania agreed on a joint hybrid submarine cable project called Baltic WindConnector in the Baltic Sea between Estonia and Germany.

An increasing need for data storage has resulted in an upsurge in the number of data centers nationwide. Several factors contribute to the demand for data centers and their growth within Germany, which is reflected by the country's evolving IT landscape, business activities, and technological initiatives.

The key drivers that propel the development of data centers in the nation include digital transformation, cloud computing adoption, e-commerce & digital services, renewable energy & sustainability, and smart cities & IoT initiatives. Hence, such factors are expected to drive market growth during the forecast period.

Germany Data Center Storage Market Trends

IT & Telecommunication Segment Holds the Major Share.

Increased adoption of cloud computing services in the country has increased IT infrastructure components. Many technology companies have launched cloud services to support the digital transformation efforts of many enterprises, and increased adoption of e-commerce services has facilitated digitization. These instances are increasing the demand for the data center storage market during the forecast period.

Moreover, the data center market is achieving new records due to the increasing penetration of connected devices, including consolidation and the emergence of new players. Such cases will have a positive impact on market growth.

Mobile broadband communication in Germany has evolved drastically. The 4G internet services were launched around 2011 in Germany, with major operators rolling out their services, with maximum download speeds recorded at around 45 Mbps. Despite the introduction of 5G around 2019, the average download speed of mobile internet in Germany accounted for about 24 Mbps, down to the increasing demand for faster internet speeds, outpacing the capacity to handle the increasing demand. To support the demand, more data centers are formed, which corresponds to positively influencing the data center storage market.

The number of servers in data centers is likely to increase as the growing demand for these digital services and the changing adoption of end users, primarily focused on digital connectivity, require more data storage. Typically, this situation corresponds to increased demand for data centers. Increasing data centers necessitates increasing the use of solutions for data storage.

With the constant evolution of network consumption and the need for faster data transmission rates in Germany, the country's laying down of fiber networks has increased. Significant network service providers are coming forward to take strategic steps through investments and partnerships to contribute to the expansion plans in the country, with the government also contributing to the same. With increasing connectivity, the number of data centers will increase, resulting in rising demand for data center storage solutions in the coming years.

Hybrid Storage is Expected to Hold a Significant Market Share

The combination of on-premises and cloud storage solutions is called hybrid storage in data centers. This approach leverages the strengths of both environments, offering the flexibility to store and manage data on-site and in the cloud.

Germany has a strong emphasis on technology innovation. Hybrid storage provides the necessary infrastructure to integrate advanced technologies such as AI, Machine Learning, and Analytics seamlessly.

Germany has strict data protection laws, and many businesses prefer data centers within the country to ensure compliance with these regulations. The focus on data sovereignty and compliance drives the demand for local data center services.

With the growing demand for faster connectivity, the demand for 5G has been growing, governments are providing support through deregulation. Moreover, the increasing adoption of 5G is analyzed in tandem with collaborations to boost the growth rate of the market during the forecast period. For instance, in June 2022, Deutsche Telekom announced that it would be the first company to offer its 5G service on frequencies in the 700 MHz band. The use of the 700 MHz band will improve mobile phone coverage in rural Germany, according to European operators. The telco found that the 700MHz frequency is being used for 5G broadcasting with about 3,000 antennas in about 1,100 locations.

The key players in the market focus on improving the data center storage solutions to meet the market demand. In July 2023, Hitachi Vantara, a prominent infrastructure, data management, and digital solutions subsidiary of Hitachi, Ltd., announced its collaboration with Microsoft to launch the Hitachi Unified Compute Platform (UCP) for

Azure Stack HCI. The powerful and streamlined hybrid cloud solution increases business flexibility. It delivers enhanced cloud management across various environments, including data centers, branch offices, and edge computing, to give businesses greater visibility and control over how their data is stored, managed, and used.

Germany Data Center Storage Industry Overview

The upcoming data center construction projects in the country are poised to drive increased demand for the Germany Data Center Storage Market in the coming years. The market in Germany is moderately consolidated, featuring key players such as Dell Inc., Hewlett Packard Enterprise, Huawei Technologies Co. Ltd., Hitachi Vantara LLC, and Kingston Technology Company Inc. These major players, with substantial market share, are actively focused on expanding their regional customer base.

In June 2023, Huawei announced the launch of its innovative data center data infrastructure architecture, F2F2X (Flash-to-Flash-to-Anything). This architecture is designed to assist financial institutions in addressing emerging data, applications, and resilience challenges, serving as a reliable source of information.

In February 2023, NetApp, a significant cloud-led, data-centric software company, unveiled the expansion of NetApp AFF C-Series, introducing a new product line of capacity flash storage that delivers lower-cost all-flash storage. Additionally, NetApp announced the introduction of NetApp AFF A150, a new entry-level storage system in the AFF A-Series line of all-flash systems.

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