

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

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Abstracts

The Ireland Data Center Market size is estimated at 0.77 thousand MW in 2024, and is expected to reach 1.48 thousand MW by 2029, growing at a CAGR of 13.86%. Further, the market is expected to generate colocation revenue of USD 2,959.9 Million in 2024 and is projected to reach USD 7,125.6 Million by 2029, growing at a CAGR of 19.21% during the forecast period (2024-2029).

Tier 3 data center accounted for majority share in terms of volume in 2023, and is expected to dominate through out the forecasted period

Tier 3 data centers are the most preferred in Ireland and registered at an IT load capacity of 164.61 MW in 2022. The capacity is expected to grow from 447.25 MW in 2023 to 1,080.85 MW in 2029, registering a CAGR of 15.84%. A Tier 3 data center has redundant and dual-powered servers, storage, network links, and other IT components. SMEs generally prefer using at least a Tier 3-rated system. SMEs are a vital component of the Irish economy, comprising 99.8% of active enterprises and 67.5% of all persons employed. End users such as BFSI and media and entertainment focus on hyperscale facility colocation. As of 2022, there were around 25 Tier 3 data centers in the country, and around 11 upcoming data centers are under construction with Tier 3 specifications.

Tier 4 data centers are the second most preferred data centers, mainly by large enterprises, as they provide 99.99% uptime. Cost constraint is the major drawback leading to the low adoption of Tier 4 facilities. However, with data traffic generation, the upcoming facilities will have Tier 4 certification since this tier enables the site infrastructure to sustain unplanned failures that would otherwise adversely affect the

critical load. Tier 4 facilities are expected to hold a market share of 22.4% by 2029, up from 2% in 2023 and 66 MW by value in 2022.

Tier 1&2 data centers are the least preferred due to their expected uptime of 99.671% (28.8 hours of downtime annually). These data centers are commonly utilized by micro businesses that want a cost-effective solution for their data storage needs. However, due to lower functionality, even SMEs are focusing on adopting wholesale colocation services under Tier 3 facilities. Tier 1 & 2 DCs are expected to showcase the least growth through the forecast period.

Ireland Data Center Market Trends

Increase in search engines and social media sites boost the market demand

The total number of smartphone users in the country was 3.73 million in 2022, and it is expected to witness a CAGR of 1.78% during the forecast period to reach 4.19 million users by 2029.

In 2024, Ireland's share of monthly active smartphone users is projected to reach 74.85% of the total population. This would be an increase of above 3% from 71.8% in 2018. Ireland's internet penetration rate stood at 99% of the total population at the start of 2022 with the emergence of 5G. A majority of internet users in Ireland utilize smartphones to use search engines, check their email, and visit social media sites at least weekly. Since the COVID-19 pandemic, more people have been shifting to contactless services. This is the case across almost all age groups, regions, and social classes. Only 47% of people over 55 stated that they used contactless payment frequently before the COVID-19 pandemic. However, 81% of them have used it more frequently since the pandemic.

With the growth of the user base of smartphones, there has been an overall positive market demand for data centers. The penetration rate has been positive with regard to usage for e-commerce, media and entertainment, and the banking payment sector, due to which a large chunk of data is being gathered. Smartphones necessitate real-time processing due to generating large chunks of data. This mostly requires data centers for storage. Overall, there is a major requirement for extra racks, which is expected to increase with the increasing number of smartphone users. As smartphone users rose, the number of racks in data centers increased from around 32,000 in 2017 to 132,000 in

2022. This trend is expected to continue during the forecast period.

Surge in FTTx cables and strong broadband connectivity is boosting the data center market

Although copper is adequate for a voice signal, it provides very limited bandwidth. Fiber provides standardized performance up to 10 Gbps and beyond. In Ireland, during the forecast period, the growth of copper connections is expected to be 16.37%, while FTTx is projected to record a growth of 36.86%. With regard to hyperscale data centers, many fiber-optic cable makers have changed their construction in a way that allows them to pack thousands of optical fibers into one cable. In Ireland, there is an increasing adoption of FTTx cables.

Ireland has six main fiber broadband providers: Digiweb, Eir, Pure Telecom, Sky, Virgin Media, and Vodafone. All Irish providers can offer speeds of a maximum of up to 1,000 Mbps to certain areas with "Fibre-to-the-Home" connections from SIRO broadband, a joint venture from ESB and Vodafone that brings 100% fiber broadband to homes in Ireland, using the existing electricity network.

Ireland's broadband speeds are improving Y-o-Y. In terms of broadband speed, Ireland ranked 36th out of 220 countries and territories worldwide in 2022, a jump from 44th place in 2021 and 51st place the year before. The COVID-19 pandemic highlighted the need for widely available and reliable digital connectivity, leading to major investments. In January 2022, Eircom Limited (Eir) and InfraVia Capital Partners announced the formation of a new joint venture, Fibre Networks Ireland Limited, to build wholesale fiber-to-the-home (FTTH) networks across the Republic of Ireland. Overall, fiber cables and strong broadband connectivity across the country are expected to support data centers during the forecast period.

Ireland Data Center Industry Overview

The Ireland Data Center Market is fragmented, with the top five companies occupying 27.18%. The major players in this market are BT Communications Limited (BT Group PLC), Digital Realty Trust Inc., EdgeConneX Inc., Equinix Inc. and K2 Strategic Pte Ltd (Kuok Group) (sorted alphabetically).

Additional Benefits:

The market estimate (ME) sheet in Excel format

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