

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

<https://marketpublishers.com/r/SCB086FBCBDBEN.html>

Date: July 2024

Pages: 191

Price: US\$ 4,750.00 (Single User License)

ID: SCB086FBCBDBEN

Abstracts

The Spain Data Center Market size is estimated at 0.94 thousand MW in 2024, and is expected to reach 1.35 thousand MW by 2029, growing at a CAGR of 7.50%. Further, the market is expected to generate colocation revenue of USD 1,827.1 Million in 2024 and is projected to reach USD 2,746.2 Million by 2029, growing at a CAGR of 8.49% 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

In 2023, the IT load capacity of tier 3 data centers in Spain is expected to reach 481.89 MW and then register a CAGR of 8.7% to surpass 795.09 MW by 2029. Conversely, tier 4 data centers are predicted to record a CAGR of 14.45%, reaching a capacity of 547.68 MW by 2029.

Over the coming years, facilities in tiers 1 and 2 will gradually slow down and exhibit negative growth, resulting from lengthy and irregular outages. Additionally, they possess a single channel for cooling and electricity, with a predicted uptime of 99.671%. Although these data centers are less expensive than tier 3 and tier 4 facilities, their reduced capability is prompting end users to increasingly opt for tier 3 and tier 4 facilities.

In 2029, tier 3 and tier 4 facilities are expected to hold major shares of 58.8% and 40.5%, respectively. The year 2023 will witness the highest demand for tier 3 facilities, which are expected to hold a market share of 65.8%. Owing to features like onsite

service, power, and cooling redundancy, tier 3 data centers are the most popular. BFSI, telecom, media, and entertainment consumers are primarily using wholesale and hyperscale colocation facilities, driving significant tier 3 facility usage.

The number of digital payment users in the country is projected to reach 40.6 million by 2027, up from 32.35 million users in 2022. Tier 4 data centers are expected to experience significant growth over the coming years. Large businesses prefer tier 4 data centers due to their fault-tolerant capabilities, reduced downtime, and 99.99% uptime. Additionally, as more companies adopt cloud-based services, the demand for tier 3 and tier 4 facilities to offer colocation space with the latest technology will increase.

Spain Data Center Market Trends

Rising smartphone ownership and increase in number of app downloads boost the market growth

The total number of smartphone users in the country was 42.51 million in 2022, which is expected to reach 46.6 million by 2029, witnessing a CAGR of 1.3% during the forecast period. In Spain, digital usage is growing quickly. The swift uptake of the internet and mobile technology in a range of enterprises has had an impact on consumer behavior. Consumer spending in Spain was USD 802.79 billion in 2021, a 12.04% increase from 2020. Thus, more people can now buy smartphones, increasing the usage of smartphones.

Over the next several years, it is anticipated that when 5G technology is deployed throughout Spain, a greater proportion of people will have smartphones that can use the new technology. Spain has four operators: Movistar, Orange, Vodafone, and Yoigo, which have 5G customers. With a 5G smartphone and a 5G tariff plan, consumers on these operators' networks spent 9.6-10.6% of their time connected to a 5G network.

The pandemic accelerated Spain's move toward digitalization. WhatsApp was the social media platform 95.05% of Spaniards utilized, followed by Instagram, Facebook, and YouTube. They spent three to four hours a day on these applications. In order to maintain contactless services, public and private organizations switched to digital platforms, which increased the need for data center services in Spain.

This tendency has been especially noticeable in the financial sector, as Spaniards are becoming more dependent on online banking. For instance, compared to 17.3% before the pandemic, 36.4% of banking service users now utilize their online banking applications every day or virtually daily. As a result, the number of data centers in Spain has increased due to the large amount of data generated by smartphones.

Increase usage of FTTx broadband and fiber optic network lead to market demand

The maximum speed of a copper-based internet connection is 62.8 Mbps, whereas the maximum speed of a fiber-optic internet connection is 134.6 Mbps. Compared to the expected speed of 1,342 Mbps in 2029, the FTTx broadband data speed in 2022 stood at 159.2 Mbps. The goal of data centers' efforts to become faster is to provide higher network connections and simple and flexible scalability as bandwidth demands change on a moment-by-moment basis. More people use the internet, which necessitates data storage that is increasing in size and boosting the volume of processing facilities.

DSL remained the most prevalent technology in Spain till 2020, while its connectivity has decreased since then. The decline of DSL networks demonstrated that Spanish operators prioritize brand-new FTTP deployments over upgrading copper networks. The trend of declining DSL coverage is the result of both targeted decommissioning and a rise in the number of households. By 2020, 84.9% of homes had access to FTTP broadband services, owing to Spanish operators' expansion of their FTTP network infrastructure, which saw a 4.6% increase in FTTP coverage.

Three major operators control the majority of Spain's extensive fiber optic network. Telecom companies better fulfill users' rising bandwidth demands with a quicker network. In terms of gigabit-speed connectivity, Spain is among the top countries, owing to the ongoing improvements in FTTP availability. The Spanish national broadband plan focused primarily on rural areas, given an already high FTTP coverage in urban areas, which is the driving rural FTTP coverage and expansion.

Spain Data Center Industry Overview

The Spain Data Center Market is fragmented, with the top five companies occupying 18.63%. The major players in this market are Acens Technologies SL, Equinix Inc., EXA

Infrastructure, Interxion (Digital Reality Trust Inc.) and T-Systems International GmbH
(sorted alphabetically).

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