

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

<https://marketpublishers.com/r/S5E6430A6A93EN.html>

Date: July 2024

Pages: 186

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

ID: S5E6430A6A93EN

Abstracts

The Sweden Data Center Market size is estimated at 331 MW in 2024, and is expected to reach 419.7 MW by 2029, growing at a CAGR of 4.87%. Further, the market is expected to generate colocation revenue of USD 351.2 Million in 2024 and is projected to reach USD 464.9 Million by 2029, growing at a CAGR of 5.77% 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

Tier 4 data centers are expected to hold a market share of over 55.4% in the Swedish data center market in 2023. It is further projected to exhibit a CAGR of 6.80% to reach an IT load capacity of 244.84 MW by 2029. On the other hand, Tier 3 data centers are expected to witness moderate growth of 4.79% till 2029. Implementation of high standards in the data center facilities ensures minimal downtime while increasing the efficiency of the facilities. These data centers with additional redundant equipment in place for backup are preferred by the customers.

Tier 1&2 facilities are losing their demand to be more competent to fulfill the growing uninterrupted services of businesses. The ever-increasing number of conglomerates business units has given rise to the need for business continuity services 24*7, which has gradually shifted the preference toward Tier 3 and Tier 4 data centers.

As of 2022, the country has nearly 30 Tier 3 data center facilities, followed by six Tier 4 data centers. STACK INFRASTRUCTURE and Equinix Inc. facilities were the first in the

country to receive the Tier 4 certification in 2016. Since then, EcoDataCentre, Bahnhof, and Multigrid have built Tier 4 data centers in the country. The growing demand from the customer's end is expected to drive the construction of Tier 3 and Tier 4 data centers in the country in the coming years.

Sweden Data Center Market Trends

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

The total number of smartphone users in Sweden was 9.46 million in 2022, and it is expected to witness a CAGR of 1.6% during the forecast period to reach a total number of 10.6 million by 2029.

Sweden is a connected country with a strong level of digital readiness with a high penetration rate for internet usage, social media engagement, mobile connections, adoption of 5G, online shopping, and digital payments. For instance, according to GSMA, in Q2 2022, Sweden had the fastest 5G median download speed in the Nordic region, partially due to the country's digitalization strategy.

In 2021, there were around 8 million users of e-commerce in Sweden, with a penetration rate of 80%. Swedish eCommerce 2021, an annual survey by payment provider Nets, indicated that overall spending on online shopping in Sweden increased by 10% in 2021, from about USD 20.3 billion (in 2020) to USD 22.3 billion. Considering the above factors, the number of smartphone users in Sweden is expected to grow over the period, driving the growth of the data center market in Sweden.

Increasing network investments to expand 5G network by provider such as Tele2 and Telenor, Net4Mobility and Telia Sweden is boosting the market demand

The four major operators in the mobile network are 3 Sweden, Tele2, Telenor, and Telia. In 2018, Telia and Ericsson introduced the first 5G network program in Sweden at Stockholm's KTH Royal Institute of Technology, which stated that the commercial launch of 5G was in 2020. Swedish providers excel in 5G speeds but not so much regarding 5G availability, which was only 10% as of Q2 2022. In 2021, over one million

subscriptions used the 5G mobile network four times more than in 2019), equal to 8% of all mobile subscriptions.

Operators are focusing on their network investments to expand 5G network coverage across Sweden. A joint venture between Tele2 and Telenor, Net4Mobility, focuses on accelerating the 5G network. Tele2 and Telenor Sweden agreed to extend the reach of Net4Mobility to 90% of the Swedish population by the end of 2023 and the remaining 20% in 2024. By 2025, Telia Sweden plans to have coverage for its 5G network that is equivalent to that of its 4G network by working with longtime partner Ericsson. By 2023, it is intended to have 5G coverage for more than 90% of the population. In the long run, this is expected to be extended to 90% geographic and more than 99% population coverage.

In 2022, 3 Sweden completed its 5G deployment on its current network. The company planned for the upgradation of its core to 5G for lower latency (2022-23), expanded and densified its network (2023–2024), and rolled out network slicing to meet the demands of businesses, including hospitals, airports, and factories. Such aspects show a promising growth of mobile data speed in the upcoming years.

Sweden Data Center Industry Overview

The Sweden Data Center Market is moderately consolidated, with the top five companies occupying 42.37%. The major players in this market are Bahnhof, Equinix, Inc., Hydro66 Svenska AB(Northern Data AG), Interxion (Digital Reality Trust, Inc.) and Stack Infrastructure, Inc. (sorted alphabetically).

Additional Benefits:

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