

Europe Data Center Colocation Market Size and Forecast (2021 - 2031)

<https://marketpublishers.com/r/EB12111FDE8FEN.html>

Date: April 2026

Pages: 186

Price: US\$ 3,450.00 (Single User License)

ID: EB12111FDE8FEN

Abstracts

The Europe Data Center Colocation Market is projected to grow significantly, reaching approximately US\$ 56,687.3 million by 2031, up from US\$ 23,439.8 million in 2024. This growth represents a compound annual growth rate (CAGR) of 13.7% from 2025 to 2031, driven by several key factors including regulatory changes, digital transformation, and sustainability initiatives.

Executive Summary and Market Analysis

The demand for data center colocation services in Europe is being propelled by a combination of regulatory momentum, the ongoing digital transition, and sustainability mandates. According to a report by Reuters, the total IT load demand for data centers in the European Union (EU), Norway, Switzerland, and the UK is expected to surge from 10 gigawatts (GW) today to 35 GW by 2030. This increase is further supported by a €30 billion public investment program initiated by the EU, aimed at establishing gigawatt-scale facilities across various member states, including a significant site in Munich that is set to become operational by September 2025.

The regulatory landscape is becoming increasingly stringent, with frameworks such as the EU's Climate Law mandating net-zero emissions by 2050. Member states are also implementing energy efficiency standards, including minimum Power Usage Effectiveness (PUE) thresholds and water usage criteria. The European Commission's sustainability policies for data centers require transparent reporting on energy and carbon performance, which is accelerating the demand for colocation providers that meet recognized certification benchmarks, such as ISO 50001 and Uptime Institute's tier standards.

Geographic diversification is another important trend, with data center operations expanding from traditional hubs like Frankfurt to emerging locations in Dublin and the Nordic countries. These regions offer cooler climates that reduce cooling requirements, enhancing energy efficiency for colocation services. European enterprises are increasingly prioritizing colocation providers that align with their carbon reduction strategies and compliance obligations. Rising energy costs and public scrutiny are also driving providers to adopt local renewable energy sources, implement heat recovery systems, and offer carbon-tracked services as competitive advantages.

Strategic Insights

Market Segmentation Analysis

The Europe Data Center Colocation Market can be segmented by type, enterprise size, and industry vertical:

By Type: The market is divided into Retail Colocation, Wholesale Colocation, and Hybrid Cloud-based Colocation. Retail Colocation is expected to hold the largest market share in 2024.

By Enterprise Size: The market is categorized into Large Enterprises and Small and Medium-sized Enterprises (SMEs), with Large Enterprises dominating the market in 2024.

By Industry Vertical: The market is segmented into IT and Telecom, Banking, Financial Services and Insurance (BFSI), Healthcare, Retail, and Others, with IT and Telecom holding the largest share in 2024.

Market Outlook

The relentless growth of global data traffic and the acceleration of digital transformation are key drivers of the increasing demand for data center colocation services. Enterprises are grappling with soaring data volumes driven by mobile broadband, video streaming, Software as a Service (SaaS), the Internet of Things (IoT), and enterprise applications. As organizations upgrade their digital products and services to remain competitive, the need for robust data center infrastructure becomes critical.

According to the International Telecommunication Union's Facts and Figures 2024,

global mobile broadband traffic exceeded 1 zettabyte in 2023, a significant increase from 5.1 zettabytes the previous year. This surge in data translates into unprecedented storage and processing demands within data centers and their interconnect networks. Mobile broadband traffic is growing at an annual rate of approximately 19.6%, while fixed broadband traffic is increasing at 15.2% per year.

As digital transformation initiatives mature, driven by cloud-native application deployments, video conferencing, content streaming, and IoT/edge environments, enterprises require high-density data center infrastructure. Cisco's Annual Internet Report (2023) indicates that there are 3.6 connected devices per capita globally, with billions of connections supporting remote work, AI workloads, and multi-cloud operations. This rapid growth in data traffic is overwhelming internal enterprise data centers and legacy operations, making colocation providers essential for scalable architectures with advanced cooling, carrier-neutral connectivity, and high-capacity interconnection options.

Country Insights

The Europe Data Center Colocation Market is also analyzed by country, with Germany, France, Italy, the United Kingdom, Russia, and the Rest of Europe being key regions. Germany is expected to hold the largest market share in 2024, driven by strong industrial digitization and stringent data sovereignty laws. Major cities like Frankfurt, Berlin, and Munich are at the forefront, with Frankfurt serving as a critical interconnection hub. However, challenges such as high energy costs and complex permitting processes may hinder expansion. The Renewable Energy Sources Act (EEG) encourages operators to utilize sustainable power sources, with many facilities relying on hydro and wind energy.

Company Profiles

Key players in the Europe Data Center Colocation Market include International Business Machines Corp, Rittal GmbH & Co KG, Equinix Inc, Digital Realty Trust Inc, CoreSite Realty Corporation, CyrusOne Inc, Telehouse, NTT Data Corp, AT&T, and Iron Mountain Inc. These companies are employing various strategies, including expansion, product innovation, and mergers and acquisitions, to enhance their market presence and offer innovative solutions to their customers.

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