The European Data Centre market is undergoing an investment boom with over 6 million m2 of space available as of the end of June 2021 according to Datacentrepricing

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The H1 2021 Edition of the Data Centre Trends Tracker identifies the key trends impacting the fifteen largest country Data Centre markets in Europe. The Tracker provides an up-to-date analysis of the largest third-party Data Centre markets as of the end of June 2021 and is updated every six months.

As of the end of June 2021, Datacentrepricing has identified the following key Data Centre trends:

i) " Datacentrepricing calculates that there is currently over 6 million m2 of equipped Data Centre space in the 15 surveyed European countries " and over 9,000 MW of power (9 GW) as of the end of June 2021.

ii) The four largest Data Centre Country markets include the UK, Germany, the Netherlands and France, which together account for seventy (70%) of all total Data Centre space across the fifteen countries, with the UK and German markets together accounting for forty-four per cent of Data Centre space in Europe - and are due to see growth of twenty-five per cent in the UK and forty-four per cent in Germany in planned Data Centre space.

iii) But the main growth in forecast Data Centre capacity is to come from the markets outside the big four, including Portugal, Ireland, Italy, Spain and Switzerland – with increases in planned Data Centre space ranging from 4.7 times (Portugal) down to 62% (Spain and Switzerland) of the current installed base.

iv) Much of European Data Centre capacity is clustered around key cities, the largest of which are Frankfurt, Amsterdam, Paris and London & Inner M25 areas, which together account for over 1.3 million m2 of Data Centre space as of the end of June 2021.

v) DCP has analysed the planned and announced Data Centre build outs in Europe, based on 109 projects, which amount to almost 1.5 million m2 of space and approximately 2,250 MW of power across fourteen (14) country markets (excluding the Czech Republic).

v1) The new Data Centre projects are focused on secondary markets, notably in Portugal, Ireland, Spain, Italy and Switzerland, with the big four markets accounting for forty-six per cent of planned developments (against 54 per cent for the secondary markets).

The growth in the secondary Data Centre markets is being driven by the construction of new large campus facilities, such as SINES 4.0 (Portugal), Aruba (Rome), Green Datacenter (Zurich), Echelon Data Centres

(Arklow, Ireland) and Interxion (Madrid). The SINES 4.0 campus facility in Portugal is to have up to 450 MW of power when complete and has the potential to quadruple the total Data Centre capacity in Portugal. The growth in large-scale investment is partly being driven by new private equity investors who are launching hyperscale facilities in new markets for the first time.

The appetite for Data Centre investment is reflected in acquisition activity as existing providers including Nordic Region Data Centre Provider DigiPlex, Conapto (Sweden) and SuperNap (Italia) have been acquired by private equity or financial investors during 2021.

Not only is demand for new Data Centre facilities is set to continue to grow, but the supply of new Data Centre capacity in new markets indicates that cloud & content services are set to be distributed widely across more European markets in the future as well as in the traditional FLAP (Frankfurt, London, Amsterdam and Paris) cities.

Note to the editor
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About the DCP Euro-DC Trends subscription service: The DCP Euro-DC Trends subscription service is published twice a year in January and July and provides analysis of the Data Centre market in each of the 15 largest European country markets (including Austria, Belgium, Czech Republic, Denmark, France, Germany Ireland, Italy, Netherlands, Poland, Portugal, Spain, Sweden, Switzerland & the UK). It provides details of average pricing, Data Centre space, Data Centre Power, Data Centre City clusters & the new Data Centre facilities planned for each of the 15 Countries and is delivered in a word format with a PowerPoint summary. The Euro-DC Trends report - H1 2021 (http://www.datacentrepricing.com/product.cfm?prod=91&dept=77) is available for GBP £895.00

About Data Centre Pricing: Data Centre Pricing (DCP) is a London-based cloud & Data Centre research company, which provides research & consultancy into 3rd party Data Centre markets worldwide. Recent research includes the Data Centre Landscapes, a detailed forecast into more than 30 European Data Centre Countries, Data Centre Mediterranean, a survey of Data Centre markets surrounding the Mediterranean Sea, Data Centre Asia Pacific, examining the key markets of Australia, China, Hong Kong, Indonesia, Japan, Malaysia, South Korea, Singapore, Taiwan, Thailand & Vietnam. Further information about DCP can be found on the Data Centre Pricing website at: www.datacentrepricing.com.