

Key Indicators



Under Construction
172 MW



Vacancy
6%

MORE INFORMATION

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GLOBAL DATA CENTER ADVISORY GROUP

Cushman & Wakefield's [Data Center Advisory Group](#) is a global team of elite professionals delivering specialized real estate solutions for mission critical users, owners, and environments. With scalability, reliability, and security as a driving force, our highly knowledgeable and responsive professionals guide clients to make effective financial decisions. Our expertise ranges includes colocation facilities, control centers, greenfields, powered shell, and trading floors. We lend additional value through our understanding of global dynamics and their impact on local markets.

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Market Overview

Recent murmurs in Frankfurt indicate that data centres will come under increased scrutiny locally, and no wonder; the city continues to grow in strength and importance as a global data centre hub, now consistently enjoying 150 MW under construction at any one time and upgraded cloud and network access across many major facilities. The last several months have seen a considerable tightening in available stock, with vacancy dropping to 6% or equivalent to many of the largest global data centre locations. Further workloads are being shopped throughout the area, and key operators have responded, with Digital Realty totaling nearly a third of the total under construction. Not to be outdone, Equinix has three phases underway currently, with another five phases coming soon as part of a further push for their xScale joint venture with GIC Real Estate, the most of any city in their portfolio. Hyperscale will also be represented in the form of self-builds going forward, with Google closing on a pair of sites locally to augment recent leasing activity. Continued strength going forward then for the data centre hub for Germany, with a cautious eye toward any potential regulatory changes.

Ecosystem Developments

- **Northern Data** launched its first data centre in the Frankfurt area at the end of 2020, providing infrastructure for a variety of high-performance computing applications. The initial facility has a capacity of 400 kW, scalable to 1.5 MW as needed. The company is now working with Goethe University to conduct research toward driving efficiencies in the high-performance compute environment.
- **Eurofiber** has extended its 38,000-kilometre network to Frankfurt, adding a point-of-presence (PoP) at Equinix FR5. This new option will include access to interconnectivity platform DCspine, and the ability to connect across the Netherlands, Belgium, and France in addition to Germany.
- **Talend** added its second in-market data centre at the end of 2020, working with Amazon Web Services (AWS) to stay in line with General Data Protection Regulation (GDPR) requirements. The capacity was provisioned for the company's Stitch product, allowing for ease of use for data ingestion and warehousing.
- Local utility **Mainova** has announced the creation of a new subsidiary, with plans to directly enter the data centre sector via collaboration with internal power projects. Specific details around a first project have yet to be released, though the company stated that they plan to submit planning documents within the next year.
- **Cyxtera** added Amsterdam and Frankfurt as markets offering their bare metal service, bringing to 12 the number of locations globally. The operator is marketing the service as an option for enterprises creating a scalable hybrid environment.
- **Equinix** has also added Equinix Metal availability in eight new markets across the globe, with Frankfurt among those with new access. Equinix Metal offers full integration with Equinix Fabric and supports a variety of deployment scenarios.
- **Digital Realty** announced a second direct local onramp to Google Cloud, with the Frankfurt expansion joining new markets in Dusseldorf, Vienna, Atlanta, and Los Angeles offering the service. The onramps will enable higher performance and further peering opportunities.
- **Oracle Cloud** created the seventh global interoperability node with Microsoft Azure in springtime, with Frankfurt joining Amsterdam and London as cities offering nodes in Europe. The interconnect will provide ease of use for clients utilizing both platforms.

Ecosystem Developments

- Polish data centre operator **Beyond.pl** is now offering a direct high-capacity fiber network among Frankfurt, Warsaw, and the company's data centers in Poznan, lowering latency to 10 milliseconds between Poznan and Frankfurt. The network could allow for Frankfurt-based enterprises to locate certain workloads outside the immediate area with potential cost savings.
- Tencent Cloud** has added a second availability zone in Frankfurt, with the city joining three others across Asia as expansion areas for the global cloud services provider. Tencent is aiming for 30% growth in global data centre coverage this year, with further expansion across Southeast Asia and the Middle East coming soon.
- DE-CIX** has launched a patented defense mechanism against Distributed Denial-of-Service (DDoS) attacks, with the beta version now available in Frankfurt along with Madrid and New York. Known as Blackholing Advanced, the service will provide further protection for traffic throughout the exchange.

Frankfurt has become a global leader with a consistent stream of new development, further peering opportunities, and enormous interest tightening any available vacancy.

Construction Update

OPERATOR	LOCATION	SIZE (SQM)	POWER (MW)	STAGE / EST. DELIVERY
Equinix	FR9x Phase I	3,216	10	Under Construction / Q3 2021
	FR8 Phase I	4,066	12 (est)	Under Construction / Q3 2021
	FR11x Phase I	5,000 (est)	14	Under Construction / Q2 2022
CyrusOne	Frankfurt III	3,067	4	Under Construction / Q3 2021
	Frankfurt IV	11,334	17	Under Construction / Q4 2022
Iron Mountain	FRA-1 Phase I	40,000	9	Under Construction / Q3 2021
Colt Data Centres	Frankfurt West	8,000	25.2	Under Construction / Q4 2021
NDC-Garbe	Hanau	10,000	10 (est)	Under Construction / Q4 2021
NTT	Frankfurt 4	9,400	12	Under Construction / Q4 2021
	Frankfurt 1	4,300	7.3	Under Construction / Q2 2022
Digital Realty	Frankfurt (6 buildings)	144,315	51.54	Under Construction / Q2 2022
maincubes	FRA02	7,500	12 (est)	In Planning

Recent Site Sales

PROPERTY	SIZE (Hectares)	SALE DATE	SALE PRICE	BUYER	SELLER
Assar-Gabrielsson-Straße 13, Dietzenbach	5.8	Dec-20	€50,000,000 (est)	Google	Heidelberg Cement
Zum Fliegerhorst, Erlensee	11.6	Dec-20	€80,000,000 (est)	Google	Hillwood, Nvelop