

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

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## Abstracts

The Belgium Data Center Market size is estimated at 253.6 MW in 2024, and is expected to reach 263.3 MW by 2029, growing at a CAGR of 0.76%. Further, the market is expected to generate colocation revenue of USD 451.1 Million in 2024 and is projected to reach USD 506.9 Million by 2029, growing at a CAGR of 2.36% 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

The tier 3 data center segment is expected to reach a capacity of 226.62 MW in 2023, and it is projected to exhibit a CAGR of 0.35%, surpassing 231.39 MW by 2029. However, the tier 4 data center segment is predicted to record a CAGR of 5.77% to reach a capacity of 26.77 MW by 2029.

In the future, facilities in tiers 1 and 2 will gradually slow down and show marginal growth owing to lengthy and irregular outages. Tier 4 facilities are expected to witness a growth in market share from 8% in 2023 to 10.2% in 2029. As a result, businesses are expected to transition to Tier 3 and Tier 4 facilities for their requirements.

Tier 3 facilities are expected to witness the highest demand in 2023. Unlike tier 4 facilities, the primary investor developing the next data center facility is focusing mostly on tier 3. However, the market is anticipated to exhibit signs of potential growth over the projection period, which may lead to hyperscale colocation being adopted by important end users in cloud services and Industry 4.0.

For instance, Belgian businesses plan to increase their use of public clouds by 15.12% between 2023 and 2027. Large corporations favor Tier 4 data centers more due to their fault-tolerant capabilities, reduced downtime, and 99.99% uptime. In 2022, Antwerp DC owned six tier 4 data centers in the nation. More businesses are expected to invest in tier 4 data centers in the future.

## Belgium Data Center Market Trends

Surge in internet banking subscribers and digital inclusion in shopping trends boost the market demand

The total number of smartphone users in the country was 10.17 million in 2022. It is expected to register a CAGR of 1.43% during the forecast period to reach a value of 11.23 million by 2029.

The growing digital inclusion in shopping trends drives smartphone penetration in the region. Looking at the country's regional split, predominantly Dutch-speaking Flanders has the highest e-commerce penetration, at 70%, as opposed to 59% in French-speaking Wallonia. A narrow digital divide exists across the two regions regarding the share of enterprises receiving online orders: close to 27% of Flemish companies received online orders in 2021 versus 20% for those based in Wallonia.

Additionally, Belgium boasts the most bank branches per person in Europe. About 69% of Belgians regularly conduct business online and utilize online banking. In Belgium, there were 14.2 million internet banking subscribers in 2020. Belgian customers are gradually utilizing internet banking in addition to the services offered by their neighborhood bank offices. For instance, the total number of banks with offices in Belgium reached over 3,200 in the Flemish region in 2019. Smartphone use is growing, which puts more strain on the servers that power the devices. The rising use of smart devices generates an ongoing growth in data, necessitating an expansion in storage capacity to accommodate this uncontrollable data flow. The market's preference for smart gadgets necessitates the expansion of data centers.

Adoption of FTTx, full fiber and ultrafast broadband is boosting the market demand

The copper broadband data speed in the country was 175 Mbps in 2022, which is expected to reach a value of 345 Mbps by 2029. The nation will need less copper cable since optic cable has more bandwidth and has shown performance at speeds up to 10 Gbps, allowing network designers to plan for future development in network speeds and requirements. Fiber optic cable also has greater data integrity and capacity than copper wire.

Since fiber offers uniform performance up to 10 Gbps and beyond, copper's highly constrained bandwidth is more than sufficient for a speech signal. While FTTx is expected to reach 3,265 Mbps in Belgium by 2029, copper is expected to rise by 170 Mbps. Telenet, Versatel, Interkabel, and Proximus (Belgacom) are a few of Belgium's fiber-optic broadband networks. Proximus is a significant telecom firm. By 2022, Belgium will have extended fiber coverage to 95% of its buildings, enabling the delivery of gigabit fiber service. According to the prediction, Belgium's total number of houses served by fiber will soar by 568% by 2027 to reach 3.9 million.

The expansion of full fiber and ultrafast broadband across the nation, which provides internet speeds of 100 Mbps and greater, has been a major factor in the surge. Although most family needs may be met by superfast internet, the demand for services that consume a lot of data, such as online video streaming, is rising. The necessity for widespread and dependable digital access has been further underscored by the COVID-19 pandemic. Overall, fiber cable has become essential for data center expansion and for connecting them to other data centers and internet exchanges. Therefore, data centers are expected to be supported by strong broadband connectivity across the nation during the forecast period.

## Belgium Data Center Industry Overview

The Belgium Data Center Market is fragmented, with the top five companies occupying 27.84%. The major players in this market are AtlasEdge Data Centres, EXA Infrastructure, Interxion (Digital Reality Trust, Inc.), Network Research Belgium SA and Proximus S.A. (sorted alphabetically).

Additional Benefits:

The market estimate (ME) sheet in Excel format

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