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

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Abstracts

The Canada Data Center Market size is estimated at 0.75 thousand MW in 2024, and is expected to reach 1.16 thousand MW by 2029, growing at a CAGR of 8.97%. Further, the market is expected to generate colocation revenue of USD 3,470.3 Million in 2024 and is projected to reach USD 5,332.8 Million by 2029, growing at a CAGR of 8.97% during the forecast period (2024-2029).

Tier 3 data center accounted for majority share in terms of volume in 2023, Tier 4 is fastest growing segment

Increased use of IoT platforms by varying sectors, such as manufacturing, agriculture, and cities, has contributed to the growing data consumption, which has triggered the demand for data centers in Canada.

For instance, out of the 189,874 farms in Canada, autosteer equipment are currently used by 27%, GPS mapping by 13%, drone usage at 3.5%, and robotic milkers at 1.2%. Agriculture IoT may help farmers increase their profitability by providing real-time insights about the crops.

Similarly, IoT platforms used in the manufacturing sector may help companies improvise supply chain processes and increase their profitability. As IoT platforms have started gaining traction, these huge amounts of generated data may require an increasing number of servers to process them faster.

Since tier 4 data centers offer higher bandwidth speed, low latency, better connectivity,

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disaster recovery options and others, most companies opt for tier 4 data centers. These data centers help companies cater to their growing business requirements, optimize efficiency, and offer better services to the consumer. Tier 4 data centers are anticipated to record a CAGR of 22.68%, which is quite higher than the growth of tier 3 at 5.79% and tier 1&2 at 0.76%.

Canada Data Center Market Trends

Increasing time on mobile apps and increasing 5G users to boost the market growth

Data consumption through smartphones is expected to increase over the forecast period in Canada, recording a CAGR of about 8.6% from 2022 to 2029. A significant increase in data consumption was observed around 2020, contributed by remote working during the COVID-19 pandemic. Canadians spent an average of 4.4 hours on mobile apps in 2021, up from 3.9 hours in 2020. This highlights the significant smartphone usage contributed by apps, which majorly adds to data consumption.

As the country plans to develop more smart cities in the future, it will integrate IoT, blockchain, AI, and other cutting-edge technologies, resulting in more significant data generation. According to the Government of Canada's Smart Cities Challenge launched in 2017, more than 225 municipalities expressed an inclination to explore the plan's advantages by filing their applications, demonstrating interest in developing more smart regions in the future. This would further be bolstered by the emergence of 5G services in smartphones and other faster network technologies, giving rise to wider deployment of smart devices that are controlled by apps in smartphones.

The revenue generated from some of the most downloaded games in Canada across Android and iOS smartphones amounted to more than USD 1.1 million, signifying the high involvement of users in the app and subsequent in-app purchases, despite them registering a lesser number of downloads compared to social media apps. The number of 5G users is expected to increase from 7% in 2021 to about 62% by 2025, further contributing to data consumption and network evolution over the forecast period.

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

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Smartphone usage in Canada is expected to record a CAGR of about 1.92% from 2022 to 2029. As of 2016, the smartphone ownership rate in Canada was about 76%, which increased to about 80.3% by 2018 and reached nearly 89% by 2021. The increase from 84.4% smartphone ownership in 2020 to 89% a year later can be attributed to the COVID-19 pandemic-led changes, primarily for remote education and working patterns. The smartphone ownership rates are estimated to reach about 90% by 2025. The increase is majorly supported by the decreasing monthly smartphone price index, decreasing from about 97.1 in January 2016 to about 42.8 in January 2021.

Although the data plans in Canada are on the higher side compared to other countries, different facilities, like contracting through a network operator, help in owning one. Customers can opt from among nine national operators in choosing their required plan, further supporting the ownership of smartphones in the country.

Data regarding the number of apps downloaded on Android smartphones highlighted that social media and online gaming apps account for the highest number of downloads. A similar trend was observed in the apps downloaded by iPhone users, with social media and online gaming apps accounting for the maximum usage. Revenue from e-commerce sales in Canada through smartphones accounted for about USD 28 billion. It is expected to reach about USD 57 billion by 2025, in line with the estimated increase in smartphone usage in the country.

The rising usage of smartphones is increasing data consumption. Over the forecast period, the country is expected to attract more apps and online platforms, requiring more processing and storage spaces and directly boosting the need for more data centers.

Canada Data Center Industry Overview

The Canada Data Center Market is fragmented, with the top five companies occupying 33.46%. The major players in this market are Beanfield Technologies Inc. (Beanfield Metroconnect), Cyxtera Technologies, Digital Realty Trust Inc., Equinix Inc. and Sungard Availability Services LP (sorted alphabetically).

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