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Netherland Data Center Construction - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts (2024 - 2030)

https://marketpublishers.com/r/N5B04BF86AB7EN.html
Date: July 2024
Pages: 90
Price: US$ 4,750.00 (Single User License)
ID: N5B04BF86AB7EN

Abstracts

The Netherland Data Center Construction Market size is estimated at USD 1.20 billion in 2024, and is expected to reach USD 6 billion by 2030, growing at a CAGR of 4.75% during the forecast period (2024-2030).

Key Highlights

The upcoming IT load capacity of the Dutch data center construction market is expected to reach more than 1490.2 MW by 2030. The country's construction of raised floor area is expected to increase by more than 6.7 million sq. ft by 2030.

The country's total number of racks to be installed is expected to be nearly 338,134 units by 2030. Amsterdam will likely house the maximum number of racks by 2030. There are close to 10 submarine cable systems connecting the Netherlands, and many are under construction. One such submarine cable, built in 2022, is BT North Sea, with landing points in Callantsoog, Netherlands.

The demand for the data center construction market in the country is being driven by factors such as a surge in cloud computing. The government regulations for data security and the increasing presence of foreign cloud vendors are contributing to this demand. According to Cloudscene, as of September 2023, there were 299 data centers in the Netherlands.

Furthermore, due to technological advancements, companies are now more focused on reducing power consumption to enhance efficiency, cut costs, and meet the rising demand for efficient facility systems. In August 2023, Microsoft was granted approval to

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construct a new data center in the Hollands Kroon region of the Netherlands. The facility is situated on 14.4 hectares within the Agriport Business Park. There are two separate buildings within the development, each capable of holding 36MW of power. These buildings, known as AMS13 and AMS1, are equipped with a total of five data halls.

The data center construction market in the country is experiencing rapid growth but is also facing challenges such as supply chain bottlenecks, longer lead times for crucial components, increased and fluctuating commodity prices, and escalating inflationary pressures. Moreover, data security has become a rising concern in the market studied due to the rise in cyber attacks and natural disasters.

Netherland Data Center Construction Market Trends

IT and Telecom to Have Significant Market Share

The cloud segment is expected to contribute the highest market share among end-user industries and witness the fastest growth during the forecast period. The cloud sector is expected to grow at a CAGR of 4.36% to surpass 276.89 MW by 2030.

Cloud storage in the Netherlands is expanding as a result of rising demand for low-cost data backup, storage, and protection across all companies and the need to manage the data produced by the increased use of mobile technology. Large service providers in the country are managing hyper-scale services and public and hybrid cloud environments.

Over the past ten years, there have been enormous advancements in the public cloud business. Many people and corporations are now utilizing the cloud because of its dependability. As a result, the cloud segment is expected to hold the highest market share of 24.4% in 2030, followed by BFSI and telecom, with market shares of 12.5% and 11.4%, respectively.

The National Cloud Policy 2011 needed revision as the reliability and security of public cloud services improved, while patches made it far more manageable than previously to correct software flaws. The new regulation permits Dutch government agencies to use public cloud services. With the new legislation, hyper scalers could negotiate new contracts with the government and reputable local cloud providers such as KPN, who provide Azure and AWS services.

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The government is expected to make more investments to innovate in areas such as quantum computing, artificial intelligence, and applications utilizing 5G and 6G technologies. It aims to attain full 5G coverage, for which it planned a 5G spectrum auction in 2023. Such aspects are expected to complement the growth and demand for data processing facilities in the Dutch telecom industry.

Amsterdam to Remain a Major Hotspot for Data Center Construction

The largest data center investments in the Netherlands are happening in Amsterdam, which is also a part of the famous FLAP-D market in Western Europe. It serves as the country's economic and technological hub. With a large number of Dutch and international businesses and institutions and one of the most significant financial centers in Europe, Amsterdam is the country's most significant economic region.

The total IT load capacity in the Amsterdam hotspot was expected to reach 1,055.64 MW in 2023. It is projected to record a CAGR of 3.14%, surpassing 1,271.15 MW by 2030. On the other hand, the Rest of the Netherlands may record a CAGR of 1.72% to reach a capacity of 219.03 MW by 2029.

Amsterdam was expected to hold the highest market share in 2023, i.e., 84.2%, which may grow to 85.3% by 2030. For instance, Principal Asset Management acquired a logistics facility in the Netherlands in August 2023. The facility, situated in the Schiphol area of Amsterdam, covers 24,755 sq. m (266,460 sq. ft) and will be transformed by Switch Datacenters into a 42 MW data center

Currently, Amsterdam is the third-largest market in Europe and has grown to be one of the most significant colocation ecosystems as a site for data centers. Amsterdam's technological infrastructure supports the city's premier internet exchange and transatlantic fiber optic links. It draws a variety of businesses, from start-ups to global leaders in AI, fintech, and medtech. Companies looking for a low-latency connection to the European market can consider collocating at Amsterdam's data centers.

Apart from Amsterdam, other regions are also contributing to the growth of the Dutch data center market, including Aalsmeer, Almere, Alphen aan den Rijn, Apeldoorn, Arnhem, Deventer, Dronten, Ede, Eemshaven, and Eindhoven.

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Netherland Data Center Construction Industry Overview

The Dutch data center construction market is fairly consolidated. Significant companies include AECOM, DPR Construction, Legrand, Kirby Group, Coromatic AB Sweden, IBM Corporation, Schneider Electric SE, and STULZ.

In November 2023, QTS Data Centers, a company that specializes in hyperscale, enterprise, and government data center solutions, acquired Zentrys, a data center management and operations company based out of the Netherlands.

In June 2023, Digital Realty acquired more land to build data centers in Amsterdam. The company aims to build a data center with 40 MW interconnected with Digital Realty's existing Schiphol facilities. Such developments are expected to drive opportunities for the vendors in the market.

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