

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

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Abstracts

The Netherlands Data Center Cooling Market size is estimated at USD 556.10 million in 2024, and is expected to reach USD 715.70 million by 2030, growing at a CAGR of 5.30% during the forecast period (2024-2030).

The increasing demand for cloud computing among SMEs, government regulations for local data security, and growing investment by domestic players are some of the major factors driving the demand for data centers in the country.

Under Construction IT Load Capacity: The upcoming IT load capacity of the Netherlands data center rack market is expected to reach 1400 MW by 2029.

Under Construction Raised Floor Space: The country's construction of raised floor area is expected to increase to 6 million sq. ft by 2029.

Planned Racks: The country's total number of racks to be installed is expected to reach 330,000 units by 2029. Amsterdam will likely house the maximum number of racks by 2029.

The Netherlands is located in a temperate zone. The country's mean winter temperature is around 3°C, and summer temperatures are about 17°C. Depending upon climatic conditions, the DC cooling is done in the DC facilities.

Planned Submarine Cables: There are close to 10 submarine cable systems connecting the Netherlands, and many are under construction.

Netherlands Data Center Cooling Market Trends

IT & Telecommunication Segment holds the Major Share

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.

Governments are also promoting public cloud services and changing regulations. Public cloud services have become more secure, and mass deployment of updates and patches has made software troubleshooting much easier than before. For these reasons, the government revised the National Cloud Policy in 2011.

Additionally, 49% of Dutch banks use the cloud, of which 38% use the public cloud. Almost 60% of Dutch healthcare institutions use private clouds, of which 43% also use public clouds. Additionally, research shows that more than 50% of government agencies worldwide use office applications in the cloud. These figures are a major driver for the 2011 Dutch National Cloud Directive revision.

The hyperscalers (e.g., AWS, Azure, Google Cloud) enter new agreements with public sector and on-premises cloud partners, including KPN, that offer Azure and AWS services. The move by the Dutch government also shows that the cloud has reached a level of maturity in the country and can be applied to a variety of government-related use cases. This shows that more racks are being used in data centers.

Further, Telecom's implementation of 5G is projected to impact data traffic positively. By 2026, the country's 3.5GHz (5G) rollout is anticipated to be complete. By 2030, 60% of the Dutch population will be covered by the 3.5GHz 5G network, up from 33% in 2023. This trend may greatly encourage the usage of VOD. Such instances in the market are expected to create more need for data centers, resulting in rising demand for data center cooling infrastructure manufacturers in the coming years.

Liquid-based Cooling is the Fastest-growing Segment

In data centers, liquid cooling offers many benefits and is an attractive option to

cool high-performance computing environments. The use of liquid cooling has been shown to be more energy efficient compared with conventional air conditioning. It reduces the need for overcooling and improves the energy efficiency of data centers by providing precise temperature control.

Technological advances have helped to reduce the data center's water consumption by more than 15% in tropical climates and 80% in green areas, making liquid cooling easier to maintain, scale up, or be affordable. Energy used for liquid cooling may be recycled to heat buildings and drinking water, while advanced artificial refrigerants can significantly reduce the carbon footprint of air conditioners.

Liquid cooling takes advantage of the space constraints and superior heat transfer properties of water or other liquids to provide efficient and cost-effective cooling of high-density racks up to 3000 times more efficiently than air. Long proven in mainframe and gaming applications, liquid cooling is increasingly being used to protect rack servers in regional data centers. For instance, Vertiv Introduced a Water-Efficient Liquid Cooling Solution for High-Density Data Centres in Europe, the Liebert XDU, a new generation of thermal management systems that supports liquid-cooled servers and enables the control of liquid quality, flow, and pressure.

Furthermore, 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 telecom industry, which will result in the rise of demand for DC cooling infrastructure in the country.

Netherlands Data Center Cooling Industry Overview

The upcoming DC construction projects in the country will increase the demand for Data Center Cooling in the coming years. The Netherlands Data Center Cooling Market is moderately consolidated with some players in the market, including Stulz GmbH, Rittal GMBH & Co.KG, Schneider Electric SE, and Vertiv Group Corp. These major players, with a prominent market share, focus on expanding their regional customer base.

April 2024: Carrier Global Corporation partnered with Strategic Thermal Labs to develop direct-to-chip cooling technology. Under this partnership, Carrier will leverage the advancement in direct-to-chip technology and incorporate it into their data center cooling solutions.

December 2023: Vertiv completed the acquisition of Cooltera Ltd, a manufacturer of coolant distribution units (CDU) and secondary fluid network (SFN). This acquisition is expected to improve the existing DC cooling solutions offered by the company.

Additional Benefits:

The market estimate (ME) sheet in Excel format

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