

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

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Abstracts

The Netherlands Data Center Market size is estimated at 1.31 thousand MW in 2024, and is expected to reach 1.49 thousand MW by 2029, growing at a CAGR of 2.63%. Further, the market is expected to generate colocation revenue of USD 4,116.4 Million in 2024 and is projected to reach USD 5,094.9 Million by 2029, growing at a CAGR of 4.36% 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

Tier 1 & 2 facilities are becoming less popular owing to the increasing demand for high computing power and data storage facilities. With the rise of business continuity services 24 hours a day, tier 3 and tier 4 data centers have increasingly become more popular due to the ever-growing number of conglomerates.

The tier 3 data center is expected to reach 974.38 MW in 2023. It is projected to register a CAGR of 2.12%, reaching 1105.23 MW by 2029. On the other hand, the tier 4 data center is predicted to register a CAGR of 5.81% to reach a capacity of 368.44 MW by 2029.

As technology advanced, the population began utilizing a variety of internet-connected devices, including smartphones, consoles, and smart gear, to access services like streaming entertainment, online gaming, and others. Tier 3 certified facilities are ideal for such services and are expected to hold the highest market share of 74.2% in 2029,

followed by tier 4 facilities with 24.7% of the market.

In order to better serve their customers, clients have to raise their rack capacities as a result of the population's adoption of other devices. In addition, they have to ensure the availability of the appropriate speeds owing to the 5G launch. As a result, the nation adopted cloud computing, the internet, and fiber technologies, formulating tier 3 and 4 data center infrastructure for better data storage solutions.

Netherlands Data Center Market Trends

Implementation of 5G with maximum Dutch population covered by 3.5GHz 5G network till 2030 boost the market demand

The total data traffic per smartphone in the country is expected to be 2.1 GB in 2023 and register a CAGR of 18.19% during the forecast period, reaching a value of 5.8 GB by 2029.

Smartphones continue to be the most popular tech device among the Dutch population. For instance, the number of smartphone connections in the Netherlands increased by 695,000 (+3.5%) between 2021 and 2022. In January 2022, there were 16.50 million internet users, or 96% of the country's population, in the Netherlands.

The adoption of 4G increased the country's use of social media platforms, owing to which the percentage of mobile usage grew by around 4%, reaching 44.05% in January 2022. For example, the Netherlands has a constantly increasing social media user base. Nearly 11.77 million people used social networks in the Netherlands in 2021, or 88% of the country's population. The Netherlands also witnessed an increased consumer expenditure on digital OTT video from 2009 to 2021, accounting for EUR 772.7 million in 2021.

The 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. More servers will be required in data centers due to their increased demand and the rising adoption of digital connectivity among end users. In general, such developments may accommodate an increase in the demand for data centers.

Increasing trend of ecommerce, social media and demand for internet is boosting the market demand

The country's total number of smartphone users was 15.88 million in 2022, which is expected to record a CAGR of 2.22% during the forecast period to reach a value of 18.12 million by 2029.

In the Netherlands, 87% of people owned a smartphone in 2020. There will be an estimated 16.12 million smartphone users in the Netherlands by 2025. From 2021 to 2025, the percentage of smartphone users increased by 3.27%. Due to the increasing amount of data generated by smartphones, the demand for storage capacity to accommodate may also increase. With a 7.6% contribution from the digital economy to the country's overall GDP of more than USD 750 billion, the Netherlands' data center market is booming.

Global e-commerce trends are also impacting the behaviors of Dutch internet users. The "phygital" strategy, which encourages retailers to combine the physical and digital aspects of purchasing, is being promoted by Thuiswinkel, the national association of Dutch e-commerce. Such a trend has increased smartphone penetration in the country.

The adoption rate of smartphones has been rising as more than half of Dutch adults use some form of social media, and nearly 90% of them use the internet. The two social networking sites, LinkedIn and Twitter, have the highest internet penetration rates in the Netherlands. In December 2021, Zeewolde, a town 50 km east of Amsterdam, approved Meta's plans to construct the biggest data center in the Netherlands to serve Facebook, Instagram, and Whatsapp users in Europe. Such developments suggest the growing demand for data centers.

Netherlands Data Center Industry Overview

The Netherlands Data Center Market is fragmented, with the top five companies occupying 36.85%. The major players in this market are CyrusOne Inc., EdgeConneX Inc., Equinix Inc., Interxion (Digital Reality Trust Inc.) and Iron Mountain Incorporated (sorted alphabetically).

Additional Benefits:

The market estimate (ME) sheet in Excel format

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