

Belgium Data Center Cooling - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts 2019 - 2030

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Report description:

The Belgium data center cooling market reached a value of USD 124.5 million in the previous year, and it is further projected to register a CAGR of 7.3% during the forecast period.

Key Highlights

- The climate in Belgium supports free cooling almost year-round, according to Google engineers, with temperatures rising above the acceptable range for free cooling about seven days per year on average. The average temperature in Brussels during summer reaches 66 to 71 degrees F (18 to 21 degrees C). To prevent the unwanted high-temperature climatic zone in summer, the usage of data center cooling is potentially being used.
- The upcoming IT load capacity of the Belgium data center market is expected to reach 263.3 MW by 2029. The country's construction of raised floor area is expected to increase to 1.3 million sq. ft by 2029.
- The country's total number of racks to be installed is expected to reach 65.8 K units by 2029. Brussels is expected to house the maximum number of racks by 2029. There are close to 5 submarine cable systems connecting Belgium, and many are under construction.
- In terms of acquisitions, in June 2023, Orange announced that Orange Belgium had completed its acquisition of a controlling stake in telco operator VOO SA. The closing of this deal will give Orange Belgium a 75% stake minus 1 share in VOO SA, with the remaining 25% plus one share retained by Nethys. Such acquisitions are expected to hold significant growth in the development of submarine cables in the forecast period.

Belgium Data Center Cooling Market Trends

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BFSI to Hold Significant Share

- Belgium has seen a rise in the use of online and mobile banking. In Belgium, several traditional banks provide mobile banking, such as ING, Santander, and others. There are also mobile-only banks like N26, Bunq, Revolut, Monese, and Soldo. With increasing digital payment and transaction methods, the increase in network traffic will lead to a major demand for servers and equipment, leading to a demand for cooling solutions.
- After COVID-19, there were over 9.1 million subscriptions in Belgium in 2020 for mobile banking, an increase over 2011. Belgian customers are gradually integrating mobile banking with in-person services from their neighborhood banks. Belgian culture is regarded as being heavily influenced by banking, as witnessed by the nation's comparatively large number of bank offices. In 2019, 3,200 banks with offices were established in the Flemish region alone.
- The use of e-wallets is also growing rapidly and is expected to keep growing, particularly among the 89% of Belgians between the ages of 35 and 44 who use online banking. Belgian citizens will be able to use a mobile app to download digital wallets for official business during the course of 2023. As preferences increasingly shift toward digital alternatives, banking consumers may become more insistent about the adoption of data centers, leading to major adoption of cooling solutions.

Evaporative Cooling to Hold Significant Growth

- In the ever-evolving landscape of data centers, efficient cooling solutions are crucial to maintain optimal performance and handle the increasing heat loads generated by modern IT equipment. Among the emerging technologies, evaporative cooling systems have gained significant traction in recent years.
- Evaporative cooling combines high thermal efficiency and cost-effectiveness by achieving low cooling temperatures with minimum energy and water usage. Most of the hyperscale facilities are adopting such a cooling method. Facilities such as BRU4 of Interxion under construction have high rack density and are expected to adopt such a cooling method.
- Of Google's six European data centers, Saint-Ghislain is the most water-intensive. It runs on an evaporative water cooling system and is the first of all Google centers to operate entirely without mechanical coolers. It is also the fourth most water-intensive of all the data giant's sites worldwide, largely because of it being one of Google's largest data centers. The Saint-Ghislain site consumes around one million cubic meters of water for its Saint-Ghislain data center. This is equivalent to the annual consumption of around 10,700 households in the region.
- With the rising demand for high-density computing applications, traditional cooling methods might be replaced by evaporative cooling units. The Belgian government is providing significant investments to develop its IT infrastructure. Incentives are available in the Flanders region for fields requiring a lot of research, such as ICT and cloud computing. Such aspects are expected to drive the demand for data storage and processing facilities, leading to cooling demand.

Belgium Data Center Cooling Industry Overview

Belgium's data center cooling market is characterized by consolidation among key players who have recently gained a competitive advantage. Major companies such as Airedale International Air Conditioning Ltd, Stulz GmbH, and Rittal GMBH & Co.KG dominate the market with a significant market share. These industry leaders are actively focused on expanding their customer base throughout the region. They employ strategic collaboration initiatives to enhance their market presence and drive profitability.

In May 2022, STULZ announced the release of its innovative product, the CyberCoolFree Cooling Booster. This unique free cooling module offers environmentally friendly cooling solutions for data centers and industrial applications. The CyberCoolFree Cooling

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Booster stands out as a versatile and high-performance solution, enabling the realization of substantial cost savings through the use of free cooling in both new and existing systems. By doing so, it contributes to improved operational reliability, extended equipment lifespan, and a reduction in CO2 emissions.

Additional Benefits:

- The market estimate (ME) sheet in Excel format
- 3 months of analyst support

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