

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

Market Report | 2024-02-17 | 90 pages | Mordor Intelligence

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### **Report description:**

The Belgian data center rack market reached a volume of over 62,000 in the previous year, and it is further projected to register a CAGR of 0.9% during the forecast period. 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.

#### Key Highlights

- Under Construction IT Load Capacity: The upcoming IT load capacity of the Belgium data center market is expected to reach above 260 MW by 2029.
- Under Construction Raised Floor Space: The country's construction of raised floor area is expected to increase above 1.3 million sq. ft by 2029.
- Planned Racks: The country's total number of racks to be installed is expected to reach 65,800 units by 2029. Brussels is expected to house the maximum number of racks by 2029.
- Planned Submarine Cables: There are close to 5 submarine cable systems connecting Belgium, and many are under construction. In April 2023, a new submarine cable project is planned in the country to connect Belgium with the United Kingdom and the Netherlands.

#### Belgium Data Center Rack Market Trends

IT & Telecommunication sector accounted for majority market share in 2022.

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- Increasing digital integration in shopping trends is driving smartphone penetration in the region. Looking at the regional breakdown within the country, the predominantly Dutch-speaking Flemish part has the highest e-commerce penetration at 70%, compared to 59% in the French-speaking Walloon region. There is a narrow digital divide between these two regions regarding the percentage of businesses that take online orders. Nearly 27% of Flemish companies received online orders in 2021, compared to 20% of companies based in the Wallonia region.
- IT and telecommunication are vital to the economic and social health of the country; it is expected to hold the highest market share in the forecasted period. Globally, Belgium ranks 44th with an average fixed broadband Internet download speed of 86.61 Mbps, while mobile Internet download speed ranks 34th with 56.46 Mbps.
- 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. These include the investment deduction for R&D, which is equal to 20.5% of the depreciated amount or 13.5% of the acquisition value of the qualified asset.
- New technologies like AI, big data, and blockchain are driving the usage of the cloud across most enterprises. Hyperscale data centers are also being used to build robust and scalable cloud networks that can save costs, boost availability, and satisfy customers. As end users consume more data for computation and storage, it increases the demand for additional racks and, in turn, expands the market for data centers in the country.

Full Rack is the fastest growing segment in 2023.

- In Belgium, due to the increasing shortage of space in various companies, full shelving has taken a large part of the market share in France. The demand for complete rack data center infrastructure is increasing to cope with the increasing rack size due to the rapid growth of mobile broadband networks and e-commerce due to the increase in big data analytics combined with cloud computing.
- Sales have increased recently in Belgium, making the country one of the fastest-growing countries in the e-commerce market. The COVID-19 pandemic increasingly prompted Belgian consumers and retailers to turn to e-commerce. The number of online shoppers aged 16 to 70 increased from 49% in 2017 to 66% in 2021. The Belgian online retailer's transaction value increased from USD 6.1 billion (EUR 5.84 billion) in 2017 to USD 9.2 billion (EUR 8.81 billion) in 2021.
- With large amounts of data generated every day, businesses rely on data centers to efficiently manage data and storage. Therefore, the increasing use of full-rack data centers is the most important factor affecting data center rack consumption. Increasing demand for technology services and investments by large companies are also changing the market growth.
- The number of people using cloud computing gradually increased from 38% in 2017 to 43% in 2019. This demonstrated the growing demand for hyperscale facilities due to the growing need for non-disruptive cloud services. These hyperscale facilities provide complete rack services to meet the increasing demand.
- Additionally, the focus was solely on data center rack infrastructure, with only size and cost considered during deployment. However, the introduction of high-density applications by various end-users, such as online banking, IT and telecommunications, media, and entertainment, creates opportunities for increased usage of full racks of data centers.

## Belgium Data Center Rack Industry Overview

The Belgian Data Center Rack Market is moderately competitive and has gained a competitive edge in recent years. In terms of market share, a few major players, such as Schneider Electric SE, Vertic Group Corp., Rittal GMBH & Co.KG, Eaton Corporation, and Norden, currently dominate the market. These major players with a prominent market share focus on expanding their customer base across foreign countries.

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In July 2023, Google planned to build up to three new data centers in our country. The data center has an area of 7,500 square meters and is scheduled to be completed in 2025. This will increase the demand for racks in the country.

In October 2022, Eaton announced the launch of an Open Rack v3 (ORV3) compatible solution by the Open Compute Project (OCP). It was purpose-built and pre-configured, focused on providing critical power in an efficient and scalable manner for data centers wishing to deploy ORV3 racks.

Additional Benefits:

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

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