

## **Netherlands Data Center Construction - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts 2019 - 2029**

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

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### **Report description:**

The Netherlands data center construction market is projected to register a CAGR of 4.75%.

#### Key Highlights

- The upcoming IT load capacity of the Netherlands data center construction market is expected to reach 1490.2 MW by 2029. The country's construction of raised floor area is expected to increase by 6.7 million sq. ft by 2029.
- The country's total number of racks to be installed is expected to reach 338,134 units by 2029. Amsterdam will likely house the maximum number of racks by 2029.
- 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.

#### Netherlands 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 2029.
- 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.
- Over the past ten years, there have been enormous advancements in the public cloud business, and the COVID-19 pandemic

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served as a significant catalyst. 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 2029, 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 the usage of public cloud services by Dutch government agencies.
- With the new legislation, hyperscalers would be able to negotiate new contracts with the government and reputable local cloud providers such as KPN, who provide Azure and AWS services.
- 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 has 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.

Amsterdam projected to remain as a major hotspot for data center construction in the country

- The Netherlands largest data center investment is 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 is 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 2029. 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 is expected to hold the highest market share in 2023, i.e., 84.2%, which may grow to 85.3% by 2029.
- Currently, it 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.

#### Netherlands Data Center Construction Industry Overview

The Netherlands data center construction market is fairly consolidated, with significant companies such as AECOM, DPR Construction, Legrand, Kirby Group, and STULZ.

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

#### Additional Benefits:

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

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