

## **Canada Data Center Market - Investment Analysis & Growth Opportunities 2025-2030**

Market Report | 2025-03-26 | 140 pages | Arizton Advisory & Intelligence

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### **Report description:**

The Canada data center market size by investments is expected to grow at a CAGR of 14.54% from 2024 to 2030.

### **KEY HIGHLIGHTS**

- Canada is witnessing significant investment in AI-ready data centers. For instance, in October 2024, eStruxture announced plans to build a new AI-ready data center in Calgary, Alberta, with an investment of around USD 540 million. The facility is likely to offer a power capacity of around 90 MW, will support rack densities of up to 125 kW and is expected to be operational by 2026.
- With the development of AI-ready data centers in the Canada data center market, the demand for liquid cooling solutions is also expected to grow. For instance, in January 2025, Bit Digital plans to upgrade its acquired facility MTL2 with direct-to-chip liquid cooling technology to support AI and other high-performance workloads.
- Major cloud service providers, including Amazon Web Services (AWS), Google, IBM, Microsoft, Oracle, and Tencent Cloud have a strong presence in the Canada data center market. In addition, existing cloud operators are expanding their cloud infrastructure due to the rising demand for cloud computing in Canada. For instance, in June 2024, Microsoft announced the start of construction on the first phase of its new data center in Quebec, which is expected to be completed by 2026.
- Operators in the Canada data center market are procuring renewable energy for their operations. For instance, the TOR01 data center campus by STACK Infrastructure is powered by 100% renewable energy. The second phase of the development will see hydroelectric power delivered by Toronto Hydro through its three diverse substations.
- The Canadian government and private companies have taken the initiative to upskill Canadian workers according to industry demand. For instance, AWS announced that, through its 'AI Ready' initiative, it will provide free AI and generative AI skills training and education to two million people by 2025.
- According to the International Trade Administration (ITA), the Canadian digital economy is expected to grow at a CAGR of around 9% through 2025. This growth is driven by factors such as increased adoption of e-commerce, investments in AI, and the expansion of digital payment in Canada.

### **WHY SHOULD YOU BUY THIS RESEARCH?**

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- Market size available in the investment, area, power capacity, and Canada colocation market revenue.
- An assessment of the data center investment in Canada by colocation, hyperscale, and enterprise operators.
- Data center investments in the area (square feet) and power capacity (MW) across cities in the country.
- A detailed study of the existing Canada data center market landscape, an in-depth market analysis, and insightful predictions about the Canada data center market size during the forecast period.
- Snapshot of existing and upcoming third-party data center facilities in Canada
  - o□Facilities Covered (Existing): 112
  - o□Facilities Identified (Upcoming): 11
  - o□Coverage: 20+ Cities
  - o□Existing vs. Upcoming (Data Center Area)
  - o□Existing vs. Upcoming (IT Load Capacity)
- Data center colocation market in Canada
  - o□Colocation Market Revenue & Forecast (2021-2030)
  - o□Retail & Wholesale Colocation Pricing
- The Canada data center landscape market investments are classified into IT, power, cooling, and general construction services with sizing and forecast.
- A comprehensive analysis of the latest trends, growth rate, potential opportunities, growth restraints, and prospects for the industry.
- Business overview and product offerings of prominent IT infrastructure providers, construction contractors, support infrastructure providers, and investors operating in the industry.
- A transparent research methodology and the analysis of the demand and supply aspects of the market.

## VENDOR LANDSCAPE

- The Canada data center market has the presence of several global support infrastructure providers that will increase its competitiveness in the market. Some of the support infrastructure vendors present in the Canada data center market include ABB, Alfa Laval, Caterpillar, Cummins, Delta Electronics, Eaton, Johnson Controls, Legrand, Schneider Electric, Vertiv, and others.
- Some of the key colocation data center investors in the Canada data center market include Cologix, Compass Datacenters Digital Realty, Equinix eStruxture Data Centers, Qscale, Urbacon Data Centre Solutions, Vantage Data Centers, and Others.
- The rising demand and significant growth opportunities have led to an increase in the investment in data centers from new entrants. These new entrants in the Canada data center market include Beacon AI Centers, Bit Digital, Cohere+ CoreWeave, Gatineau Data Hub (GDH), and Yondr. The rise in new entrants will increase competitiveness in revenue generation in the market in the coming years.
- The Canada data center market has several local and global construction contractors operating in the market including Arup, AECOM, Bird Construction Black & Veatch, DPR Construction, First Gulf, HDR, Jacobs, Karbon Engineering, PCL Construction, Pomerleau, Revenco, Rider Levett Bucknall (RLB), Salas O'Brien, Salute, Stantec, Turner Construction and others that have been offering their services in the market. For instance, In July 2024, Salas O'Brien announced the merger with Ehvert Mission Critical to offer design and construction services for hyperscale data centers.

## EXISTING VS. UPCOMING DATA CENTERS

- Existing Facilities in the Region (Area and Power Capacity)
  - o□Montreal
  - o□Toronto
  - o□Other Cities
- List of Upcoming Facilities in the Region (Area and Power Capacity)

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- o Montreal
- o Toronto
- o Other Cities

#### IT Infrastructure Providers

- Arista Networks
- Atos
- Broadcom
- Cisco Systems
- Dell Technologies
- Hewlett Packard Enterprise
- Huawei Technologies
- IBM
- Juniper Networks
- Lenovo
- NetApp
- Oracle

#### Data Center Construction Contractors & Sub-Contractors

- Arup
- AECOM
- Bird Construction Black & Veatch
- Computer Room Services Corporation (CRSC)
- DPR Construction
- EllisDon
- First Gulf
- HDR
- Jacobs
- Karbon Engineering
- PCL Construction
- Pomerleau
- Revenco
- Rider Levett Bucknall (RLB)
- Salas O'Brien
- Salute
- Stantec
- Turner Construction
- TAG Engineering
- Urbacon
- WZMH Architects

#### Support Infrastructure Providers

- ABB
- Alfa Laval
- Caterpillar
- Chatsworth Products
- ClimateWorx

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- []Generac
- []Johnson Controls
- []KyotoCooling
- []Legrand
- []Mitsubishi Electric
- []Panduit
- []Piller Power Systems
- []Rittal
- []Rolls-Royce
- []Schneider Electric
- []Siemens
- []STULZ
- []Toshiba
- []Trane
- []Vertiv

#### Data Center Investors

- []Cologix
- []Compass Datacenters
- []Digital Realty
- []Equinix
- []eStruxture Data Centers
- []Google
- []Microsoft
- []OVHcloud
- []Qscale
- []STACK Infrastructure
- []Telehouse
- []Urbacon Data Centre Solutions
- []Vantage Data Centers

#### New Entrants

- []Beacon AI Centers
- []Bit Digital
- []Cohere+ CoreWeave
- []Gatineau Data Hub (GDH)
- []Yondr

#### REPORT COVERAGE:

This report analyses the Canada data center market share. It elaboratively analyses the existing and upcoming facilities and investments in IT, electrical, mechanical infrastructure, general construction, and tier standards. It discusses market sizing and

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investment estimation for different segments. The segmentation includes:

- IT Infrastructure
  - oServers
  - oStorage Systems
  - oNetwork Infrastructure
- Electrical Infrastructure
  - oUPS Systems
  - oGenerators
  - oTransfer Switches & Switchgears
  - oPDUs
  - oOther Electrical Infrastructure
- Mechanical Infrastructure
  - oCooling Systems
  - oRack Cabinets
  - oOther Mechanical Infrastructure
- Cooling Systems
  - oCRAC & CRAH Units
  - oChiller Units
  - oCooling Towers, Condensers & Dry Coolers
  - oOther Cooling Units
- General Construction
  - oCore & Shell Development
  - oInstallation & Commissioning Services
  - oEngineering & Building Design
  - oFire Detection & Suppression Systems
  - oPhysical Security
  - oData Center Infrastructure Management (DCIM)
- Tier Standard
  - oTier I & Tier II
  - oTier III
  - oTier IV
- Geography
  - oMontreal
  - oToronto
  - oOther Cities

#### TARGET AUDIENCE

- Real Estate Investment Trusts
- Construction Contractors
- Infrastructure Providers
- New Entrants
- Consultants/Consultancies/Advisory Firms
- Corporate and Government Agencies

#### KEY QUESTIONS ANSWERED:

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1. How big is the Canada data center market?
2. How many existing and upcoming data center facilities exist in Canada?
3. How much MW of power capacity will be added across Canada during 2025-2030?
4. What is the growth rate of the Canada data center market?
5. What factors are driving the Canada data center market?
6. Who are the key investors in the Canada data center market?

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