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

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Abstracts

The Poland Data Center Market size is estimated at 309.8 MW in 2024, and is expected to reach 561 MW by 2029, growing at a CAGR of 12.61%. Further, the market is expected to generate colocation revenue of USD 1,122.7 Million in 2024 and is projected to reach USD 2,033.2 Million by 2029, growing at a CAGR of 12.61% 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 4 data centers lead the market in terms of tier capacity. Tier 4 data centers are expected to increase from 65.2 MW in 2023 to 226.7 MW by 2029 while recording a CAGR of 23.1%. The initial data centers constructed were small and had basic infrastructure facilities. These facilities were Tier 1&2, which served a minimal purpose and had fewer racks. Growing demand for smartphone applications by Polish users for various digitized services has led companies to opt for data centers housing more racks, better infrastructure facilities, better bandwidths, and lower downtime. This led the IT load capacity to increase from 23 MW in 2017 to 65.2 MW in 2023.

Tier 1&2 facilities witnessed a steady demand over the years and are expected to see steady growth over the coming years as well. Tier 1&2 facilities held a market share of 8% in 2017 and are expected to hold an 8% share in 2023 and 9% in 2029. On the other hand, the demand for Tier 4 facilities has gained traction as its market share increased gradually from 12.9% in 2017. It is expected to reach 26.8% and 37.7% in 2023 and 2029, respectively.

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Nearly 24 facilities are configured under Tier 3 standards, which are majorly preferred by small, medium, and large data center facilities. Of these 24 facilities, 11 of them are located in Warsaw, which is one of the prime hotspots for data center facilities as it is the economic capital of the country.

The development of smart cities and connected network solutions have triggered the adoption of Tier 4 facilities. For instance, Tychy recently implemented a new intelligent transport system (ITS) that would help Poland monitor real-time traffic. Thus, to facilitate uninterrupted vigilance with assured uptime to process these huge amounts of data, Tier 3 and Tier 4 data center facilities are expected to grow proportionally.

Poland Data Center Market Trends

Increasing smartphone apps across end users and subsequent adoption of 5G smartphone devices leads to demand for data center

Smartphone usage in Poland has increased over the years, as evident from the rising smartphone penetration rate in the country. The smartphone penetration rate rose from around 60% in 2016 to about 86% in 2021, accounting for a significant increase in the country's overall smartphone usage and the evolution of its network portfolio. The smartphone penetration rate is further expected to grow to about 88% by 2025.

In 2020, the Office of Electronic Communications reported an increase of 21.06 Mbps in the average download speed of a mobile application across internet providers in Poland, which rose to 34.82 Mbps in 2021 and 41.7 Mbps in 2022. The significant increase in 2021 can be attributed to the introduction of 5G and the subsequent adoption of 5G smartphone devices to leverage the new technology, which resulted in higher transmission rates.

Active mobile phone ownership rates also shape smartphone penetration and sales in the country. About 51.6 million SIM cards were active in Poland in 2018, compared to about 56.6. million active SIM card owners in 2021. This signifies the active participation of users in shaping the user base for data centers during the COVID-19 pandemic, which saw an increase in smartphone usage in Poland. End-user segments like e-commerce, which can be easily reached through smartphones, influenced the normalizing of smartphone use with an increment in the number of registered e-

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commerce stores in Poland, rising from about 36,600 stores in 2019 to nearly 55,000 in 2022. Thus, as smartphone usage increases in the country, the demand for data centers to handle the generated data will also increase, contributing to the market's growth over the forecast period.

Increasing FTTP users and investment such as Recovery and Resilience Facility (RRF) and the European Regional Development Fund (ERDF) towards broadband inclusion leads to the market growth

The increasing data consumption and demand for higher data transmission rates are driving the evolution of fixed internet usage in Poland. The fixed broadband penetration in the country increased from about 62% in 2019 to about 69% in 2021, getting closer and in line with the EU average of 78%. About 28% of Polish households in 2019 featured at least 100 Mbps fixed broadband take-up, compared to about 43% in 2021, which was in line with the EU average of 43%.

This growth in the average household broadband take-up is attributed to the country's higher preference for services like FTTP. Poland witnessed an increase in FTTP coverage from 44.6% in 2020 to about 51.9% in 2021. The urban take-up of the service was higher than the rural adoption, generating significant demand, as the rural coverage of the services remained at around 32.6% in 2021, with a moderate increase from the 24.1% registered in 2020. This signifies the deeper penetration of FTTP technology in the country, which is expected to generate more data-generating nodes and contribute to extensively generating data sets through the forecast period.

The deeper penetration and infrastructural development of broadband services are already attracting investments from the Polish government through funds like the Recovery and Resilience Facility (RRF) and the European Regional Development Fund (ERDF) contributing about EUR 2 billion to add to the broadband inclusion of more than 1.5 million households. Such factors are expected to facilitate faster data transmission and lay the foundation for a highly potent fiber network in Poland, connecting data centers with edge computing stations such as internet exchanges and telecommunication service providers.

Poland Data Center Industry Overview

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The Poland Data Center Market is fragmented, with the top five companies occupying 22.57%. The major players in this market are Comarch SA, Deutsche Telekom AG (T-Mobile Poska SA), Equinix Inc., S-NET Sp. z.o.o (TOYA Group) and Vantage Data Centers LLC (sorted alphabetically).

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