



DATA CENTRE MARKET IN POLAND 2025

MARKET ANALYSIS AND DEVELOPMENT
FORECASTS FOR 2025-2030



As a result of ongoing digitalization, companies are forced to store increasingly larger volumes of data, making it progressively more difficult to store them securely within their own infrastructure. The increasing demand is being met through the expansion of cloud services and data centers, which allow businesses to securely relocate their digital assets off-premises while maintaining constant access and high levels of security. Data security, on which companies are becoming increasingly dependent, is a particularly important issue in the face of a significant rise in cyber threats.

The report **„Data Center market in Poland 2025”** presents the value of the data center market and the structure of expenditures broken down by individual types of services. It also analyzes volume-related aspects, such as the area of data centers divided into net and gross space, as well as the total power capacity of data centers in Poland. The report also includes information on the use of data centers by enterprises - among others, the criteria they follow when choosing providers.

The study also outlines key market trends, major events, and investments in the context of forecasts for market development between 2025 and 2030. Within the forecasts, particular emphasis is placed on electricity prices, which are a significant factor influencing market value. The report also presents data on the competitive landscape - detailed profiles of nearly 40 providers and information on the number of commercial data centers in Poland, along with their structure based on power capacity, area, and geographical location.



Main objective

Providing a comprehensive description of the data centre market, including a breakdown into segments.

Additional objectives

The specific objectives of the research and analysis carried out for the report were to identify:

- segments of data centre services and to present forecasts of their development
- key macroeconomic, demand-side, supply-side, technological and legal factors and trends affecting the data centre market
- the value of different types of services offered by data centres
- motivations of companies to use data centre services
- market players and their data centres.

What can be found in the report?

- **market value** in 2014-2024
- **market structure** in 2014-2024, by segment
- key events and **investments in the market**
- macroeconomic, demand-side, supply-side, technological and legal **factors affecting the market**
- **scale of use of data centre resources** by Polish companies
- **major players** in the data centre market
- **forecasts up to 2030** for:
 - the data centre market
 - major segments in the data centre market
 - electricity prices
 - changes in macroeconomic factors



TIME SPAN: 2014-2024

FORECAST HORIZON: 2025-2030

GEOGRAPHIC COVERAGE: Poland

SCOPE

Segments:

- colocation
- server hosting
- managed services
- public cloud
- private/hybrid cloud
- additional services
- backup

SUBJECT MATTER

- market value
- market in volume terms:
 - total (net and gross) area of data centres
 - total data centre capacity (MW)
 - net occupancy rate
 - number of data centres
 - breakdown of data centres by facility size
 - breakdown of data centres by geographical location
- breakdown of the total market value by segment
- forecasts for:
 - the total market
 - individual market segments
- profiles of major players in the data centre market





FORECASTS

For the purpose of the report, long-term development forecasts were prepared using econometric models and historical time series.

The forecasts cover the period 2025-2030.

In addition to projections for the market value and its segments, the report also covers forecasts for 2025-2030 for selected macroeconomic indicators, as well as forecasts for energy prices and related indicators:

- price index for thermal coal produced by domestic manufacturers and sold on the domestic energy market (PSCMI index) in Poland,
- prices of carbon emission allowances,
- oil prices (Brent), gas prices (in Europe) and Australian coal prices,
- GDP and investment growth in the world, in developed and developing economies and in Poland.

Why to buy this report, i.e. what important questions it answers:

- What is the value of the data centre market in Poland?
- How large is the area of data centres in Poland?
- What are the planned investments in data centres over the next five years?
- What are the value of individual segments and their development forecasts for the next 5 years?
- How many companies in Poland use data centres?
- How do companies choose data centre services?
- What role does the Polish market play according to global players?
- What are the prevailing trends in the Polish data centre market?
- How do rising energy prices affect the data centre market in Poland?
- What is the competition in the data centre market in Poland?



Together with the report, we provide the most important data in the Excel spreadsheet for individual aggregation.

We are one of the leading research and analytics companies in Poland!

As **PMR Market Experts**, we help our Clients to obtain and analyse data, enabling them to better understand market processes, plan strategic and operational actions, and ultimately develop their business.

We boast **30 years of experience** and a **team of nearly 100 experts**. In our reports, we use secondary data combined with proprietary primary databases and qualitative and quantitative research.

We provide **market analyses for four main sectors**:

- construction,
- retail,
- healthcare and pharmaceuticals,
- IT and telecommunications.

We also prepare **customised research projects** focused on the area chosen by the Client. In addition, we offer **consultancy services** combining different areas, i.e. marketing research, market sizing, forecasting, and sales management.



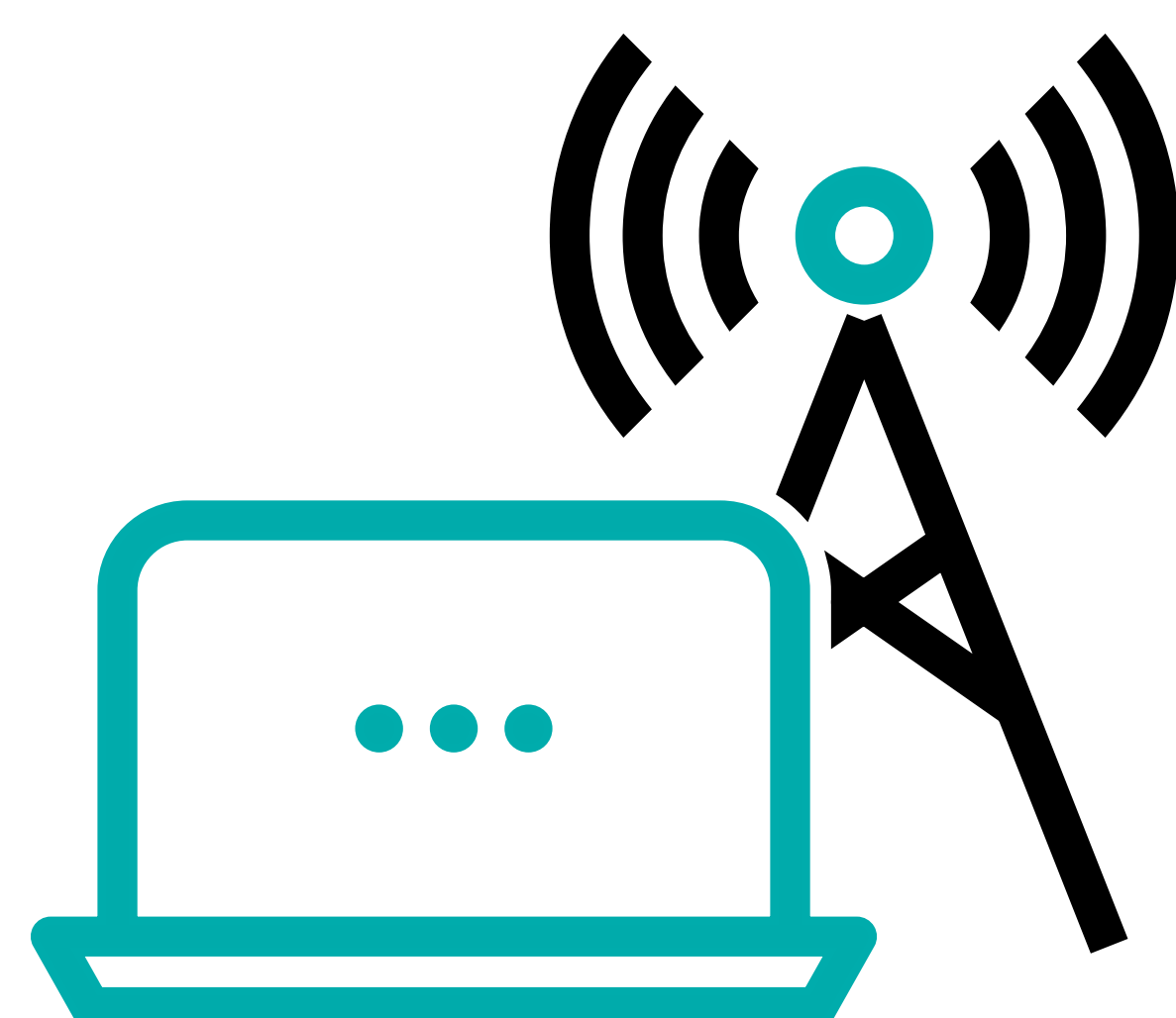
Forecasting methodology

The class and type of the developed **econometric models** are selected according to the **characteristics of the data analysed**. In practice, models using **multiple regression** (the least squares method) and **autoregression** (ARIMA, VAR) are the most common. We use both **primary variables** and their **transformations** (e.g. logarithms) to capture the relevant relationships.

The **final market value forecasts** are not just based on a single best model but are a **weighted average of forecasts** from a selected set of best models. The weights are selected based on model fit indices. This procedure makes it possible to consider **more factors** influencing market development, hence **improving the forecast precision**.

When developing the **final forecasts**, we take into account not only the **statistical quality of the models** (model adjustment to empirical data, normality and homoscedasticity of residuals, statistical significance of structural parameters) but also their **consistency** with market knowledge and **qualitative information** gathered by PMR's analytical team.

The models use data on industry sectors, macroeconomic indicators and demographics, as well as the results of our analyses. Most often, there are **60-80 types of indicators** considered.



ICT & TMT

MARKET ANALYSIS AND 5-YEAR DEVELOPMENT FORECASTS

- **AI** market in Poland
- **Cloud computing** market in Poland
- **IT equipment and consumer electronics resale** market in Poland
- **Internet of Things** market in Poland
- **Data centre** market in Poland
- **Online services** market in Poland
- **Gaming** market in Poland – trends in the market for video games, equipment and accessories
- **Pay TV and VOD** market in Poland
- **Integrated telecommunications services** market in Poland
- **Telecommunications services for business and carrier segment** in Poland
- **ICT** market in Poland
- **Mobile internet and value-added services** market in Poland
- **Cybersecurity** market in Poland
- **Telecommunications** market in Poland
- **Business systems and applications** market in Poland
- **IT services** market in Poland
- **Labour market and IT wage structure** in Poland
- **ESG reporting** – challenges and development prospects in Poland
- **Smart home** market in Poland
- **Wearables** market in Poland

NOVELTIES



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