

## **Poland 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 Polish data center rack market reached a volume of over 80,000 in the previous year, and it is further projected to register a CAGR of 15.1% 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 Poland data center market is expected to reach more than 500 MW by 2029.
- Under Construction Raised Floor Space: The country's construction of raised floor area is expected to increase above 3.7 million sq. ft by 2029.
- Planned Racks: The country's total number of racks to be installed is expected to reach above 187,000 units by 2029. Warsaw is expected to house the maximum number of racks by 2029.
- Planned Submarine Cables: There are only 2 submarine cable systems connecting Poland, and many are under construction. For instance, in May 2022, the Polish Mint Group entered a new strategic business area through its subsidiary. In the same month, a contract was signed with Nokia's Alcatel Submarine Networks to build a submarine fiber optic cable as part of a cable system connecting Europe and the Middle East. The value of the order is USD 91.5 million. More contracts are due to be signed soon, bringing the total value of his project to USD 190 million. The system is expected to be operational by mid-2024.

#### Poland Data Center Rack Market Trends

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Full Rack is the fastest growing segment in 2023.

- In Poland, due to the increasing shortage of space in various companies, full rack in data centers has taken a large part of the market share in France. The demand for full-rack data center infrastructure is increasing to cope with the increasing rack size due to the rapid growth of mobile broadband networks due to the increase in big data analytics combined with cloud computing.
- Poland is witnessing the evolution of smartphone usage, evident from the increasing data consumption and demand for faster internet access by the Polish population. The network latency in Poland decreased from about 69 ms in 2016 to about 33 ms in 2022. The Polish market is at an evolving stage for gaming and other mission-critical and real-time applications, encouraging users to switch to faster smartphones and network alternatives to leverage such a potent network, contributing to overall usage.
- Further, with large amounts of data generated every day in Poland, 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.
- Around 84% of the companies sell their products online, and the age group that actively purchases the products lies in the range of 29-49 years. Clothing and shoes are the most sought-after products, accounting for around 44% of e-commerce sales. The growing demand for online shopping would simultaneously increase data consumption, leading to an increased IT load capacity for processing these huge amounts of data. The number of racks is expected to grow with the growing demand.

IT & Telecommunication is the largest segment

- One of the best-performing and most promising ICT sectors is the gaming industry. Poland's turnover is EUR 500 million (USD 539.14 million), making it the 23rd most profitable country globally. About 500 games are produced in Poland every year. CD Projekt, 11 Bit Studios, The Witcher, and This War of Mine are among the companies that have brought Poland to the global gaming scene.
- Web and mobile development outstaffing/outsourcing are the main business models of Polish IT companies. Of particular note is the IT outsourcing market and the increase in human resources. As software development penetrates almost every industry, the demand for IT services in Poland is increasing. Poland's IT outsourcing sector is one of the most advanced, even more advanced than the IT hardware sector.
- Manufacturing is a growing market in the country due to increased investment in plant automation and Industry 4.0. For example, companies such as Robotic Inventions and TMA Automation offer automation solutions used on assembly lines. Industrial robot sales increased from 1,632 units in 2016 to 2,147 units in 2020 and peaked at 2,651 units in 2018, demonstrating the increasing focus on factory automation in the country.
- The telecommunications department has upgraded its technology several times and now uses cloud infrastructure. 73% of telcos now run at least one cloud infrastructure application in the cloud. Telcos are moving away from using complex virtual machines to cloud infrastructure as cloud infrastructure improves scalability through auto-scaling options. Cloud infrastructures are further evolving into hybrid cloud structures where public and private cloud services work together to distribute workloads and provide better service.

#### Poland Data Center Rack Industry Overview

The Polish 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 Black Box Corporation, Eaton Corporation, Hewlett Packard Enterprise (HPE), Rittal GMBH & Co.KG, and Schneider Electric SE, currently dominate the market.

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In October 2022, Eaton Corporation announced the launch of an Open Rack v3 (ORV3) compatible solution by the Open Compute Project (OCP). It is 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

## **Table of Contents:**

### 1 INTRODUCTION

- 1.1 Study Assumption & Market Definition
- 1.2 Scope of the Study

### 2 Research Methodology

### 3 Executive Summary

### 4 Market Dynamics

- 4.1 Market Overview
- 4.2 Market Drivers
  - 4.2.1 Rapid adoption of Cloud Services in the country
  - 4.2.2 Significant growth in Data generation
- 4.3 Market Restraints
  - 4.3.1 Increasing number of Data Security Breaches
  - 4.3.2 Low Availability of Resources
- 4.4 Value Chain / Supply Chain Analysis
- 4.5 Industry Attractiveness - Porter's Five Forces Analysis
  - 4.5.1 Bargaining Power of Buyers/Consumers
  - 4.5.2 Bargaining Power of Suppliers
  - 4.5.3 Threat of New Entrants
  - 4.5.4 Threat of Substitute Products
  - 4.5.5 Intensity of Competitive Rivalry
- 4.6 Assessment of COVID-19 Impact

### 5 MARKET SEGMENTATION

- 5.1 Rack Size
  - 5.1.1 Quarter Rack
  - 5.1.2 Half Rack
  - 5.1.3 Full Rack
- 5.2 End-User
  - 5.2.1 IT & Telecommunication
  - 5.2.2 BFSI
  - 5.2.3 Government
  - 5.2.4 Media & Entertainment
  - 5.2.5 Other End-Users

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## 6 COMPETITIVE LANDSCAPE

### 6.1 Company Profiles

#### 6.1.1 Eaton Corporation

#### 6.1.2 Black Box Corporation

#### 6.1.3 Rittal GMBH & Co.KG

#### 6.1.4 Schneider Electric SE

#### 6.1.5 Vertiv Group Corp.

#### 6.1.6 Dell Inc.

#### 6.1.7 nVent Electric PLC

#### 6.1.8 Hewlett Packard Enterprise

#### 6.1.9 Econnex Comparison

## 7 INVESTMENT ANALYSIS

## 8 MARKET OPPORTUNITIES AND FUTURE TRENDS

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