

France Data Center Rack - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts 2019 - 2030

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Report description:

The France data center rack market reached a volume of around 248,000 in the previous year, and it is further projected to register a CAGR of 4.1% 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 French data center market is expected to reach 1,300 MW by 2029.
- Under Construction Raised Floor Space: The country's construction of raised floor area is expected to increase to 6.3 million sq. ft by 2029.
- Planned Racks: The country's total number of racks to be installed is expected to reach 316,000 units by 2029. Paris (Ile-De-France) is expected to house the maximum number of racks by 2029.
- Planned Submarine Cables: There are close to 28 submarine cable systems connecting France, and many are under construction. In April 2023, French telecom operator Orange announced the construction of a submarine cable linking the city of Bizerte in Tunisia with the city of Marseille in France. Commissioning is scheduled for the end of 2025.

France Data Center Rack Market Trends

IT & Telecommunication sector accounted for majority market share in 2022.

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- Cloud data centers house IT infrastructure resources for shared use by multiple customers via an internet connection.
- The expansion of its IT infrastructure has been receiving major funding from the French government. The popularity of and investments in cloud computing services are rising in France. The French government set a EUR 1.8 billion (USD 2.1 billion) plan for 2021 to finance research initiatives to expand France's cloud computing business.
- The rising adoption of the cloud across most businesses is being driven by new technologies like artificial intelligence, big data, and blockchain. The share of companies that acquired cloud computing services increased from 17% in 2016 to 27% in 2020, suggesting an upward trend and a growing demand for data processing facilities. Scalable and strong cloud networks are being developed with the help of hyperscale data centers, which can enhance customer satisfaction, increase availability, and cut costs.
- Regional cloud infrastructure providers such as Equinix, OVHcloud, and Dassault Systemes have partnered with international hyperscalers such as Amazon Web Services (AWS), Google Cloud Platform (GCP), and Microsoft Azure to bring French cloud infrastructure to improve and enable a resilient future. Europe-based global service providers such as Capgemini, Orange, Atos, and Soplastra also invest in similar partnerships.
- Additionally, Tier 4 data centers are expected to grow significantly over the next few years. This is because more and more companies are offering cloud-based services, and with that, more and more companies are building facilities that offer colocation spaces with the best technology.

Full Rack accounted for majority share in the country

- Due to the increasing shortage of space in various companies, full shelving has taken a large part of the market share in France. The demand for complete 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.
- With large amounts of data generated every day, 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.
- Initially, the focus was solely on data center rack infrastructure, with only size and cost considered during deployment. However, the introduction of high-density applications by various end-users, such as online banking, IT and telecommunications, media, and entertainment, creates opportunities for increased usage of full racks of data centers.
- Most French online shoppers continue to shop from their homes or businesses. Sales increased in France, Europe's second-largest e-commerce sector. In 2022, the total e-commerce industry revenue will reach EUR 146.9 billion (USD 160.17 billion), up 13.8% year-on-year. The consumer goods sector, which grew during the pandemic, saw a 1% increase in online sales from 2021 to 2022, primarily due to overall price increases in 2022. Industry sales increased by 56% from 2019 levels.
- The e-commerce sales revenue of France exceeded EUR 129 billion (USD 140.65 billion) in 2021, an increase of 15.1% over the year, whereas during the same period, the data traffic witnessed growth from 2.2 GB per smartphone per month to 9.7 GB. Such huge data transfer creates a demand for full racks in DC facilities.

France Data Center Rack Industry Overview

The French 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 Schneider Electric SE, Vertiv Group Corp., Legrand S.A., Minkels B.V., and Eaton Corporation, currently dominate the market. These major players with a prominent market share focus on expanding their customer base across foreign countries.

In October 2022, the company announced that it started construction on its second data center at its TH3 Paris-Mani campus in

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France. The new Magny 2 facility is located on the former EADS military site and offers 12,000 square meters of IT space and 18 MW of capacity in five buildings. The opening is scheduled for October 2023.

In June 2022, SFR BUSINESS was strengthening its hosting offer for companies with 26 new data centers in France via a partnership with Equinix and Interxion.

Additional Benefits:

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

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