SCOTTS
INTERNATIONAL

France Data Center - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts (2025 - 2030)

Market Report | 2025-04-28 | 190 pages | Mordor Intelligence

AVAILABLE LICENSES:

- Single User License $4750.00
- Team License (1-7 Users) $5250.00
- Site License $6500.00
- Corporate License $8750.00

Report description:

The France Data Center Market size is estimated at 1.27 thousand MW in 2025, and is expected to reach 1.68 thousand MW by 2030, growing at a CAGR of 5.70%. Further, the market is expected to generate colocation revenue of USD 1,799.3 Million in 2025 and is projected to reach USD 3,157.8 Million by 2030, growing at a CAGR of 11.91% during the forecast period (2025-2030).

Tier 3 data center accounted for majority share in terms of volume in 2023, and is expected to dominate through out the forecasted period

- The tier 3 data center capacity is expected to reach 782.67 MW in 2023 and is further projected to register a CAGR of 4.46%, surpassing 1016.98 MW by 2029. On the other hand, the tier 4 data center is predicted to grow and register a CAGR of 6.72% to reach a capacity of 283.98 MW by 2029.
- Facilities in tier 1 and tier 2 gradually lose their demand and display a decrease in growth in the upcoming years. Tier 1 and 2 facilities are expected to hold a market share of nearly 2% by 2029 with minimal growth. This is a result of the prolonged and inconsistent outages. Most users will eventually switch to tier 3 and 4 facilities, holding 76.5% and 21.4% of the market share, respectively, owing to the increased demand for storing, processing, and analyzing data.
- The BFSI sector of the economy is expanding. In recent years, France has seen a rise in the use of online and mobile banking. In the European market, France has one of the top 15 best rates of online banking penetration. As of 2021, 72% of French consumers were using online banking, which increased from 62% in 2017. This necessitates the construction of wholesale and hyperscale facilities, which have tier 3 and 4 requirements and is driven by the rising demand for e-banking and online transactions.
- Additionally, tier 4 data centers are expected to expand significantly in the years to come. This is because more businesses are

providing cloud-based services, which has caused more businesses to construct facilities to provide colocation space with the best technology.

France Data Center Market Trends

Rising smartphone users and cashless transactions boost the market growth

- The total number of smartphone users in the country was 54.20 million in 2022, which is expected to register a CAGR of 1.25% during the forecast period to reach a value of 59.15 million by 2029.
- Digital usage is expanding rapidly in France. The quick internet and smartphone technology adoption in various businesses has impacted consumer behavior. For instance, from 2018 to 2021, the per capita purchasing power per person in France increased from 0.9% to 2%. As a result, more people can purchase smartphones, leading to a growing number of smartphone users.
- The internet penetration of the country increased from 80.05% in 2017 to 84.8% in 2020, while the number of smartphone users increased from 39.7 million in 2017 to 49.8 million in 2020. Owing to such extensive use, digital payment services were promoted, and their application increased due to the COVID-19 pandemic. Additionally, the nation raised the payment threshold from EUR 30 to EUR 50 to lessen the chance of the virus spreading. People are now more inclined to prefer cashless transactions, which is predicted to have a long-term impact on the market. Consequently, there are more smartphone users in France.
- The rising use of smartphones in the French market results in a constant increase in data, necessitating a growing amount of storage space to accommodate this uncontrollable flow of data with the need for real-time processing and analysis. The data centers must manage the sheer amount of data. Thus, the requirement for extra racks in French data centers may increase as the number of smartphone users rises.

Rising adoption of e-commerce, 5G infrastructure and digital banking such as Neobank increases the adoption of market demand

- In 2022, the nation's average data speed was 59.66 Mbps. The mid-2000s saw the introduction of 4G in France. France launched its 5G services in 2020. Since the launch of both services, 4G reached 86.72 Mbps in 2022 and 5G reached 201.3 Mbps by 2022. Four French mobile service providers, Orange, SFR, Bouygues Telecom, and Free Mobile, tested their 4G offerings in 2013 in Paris, Marseille, Lyon, Lille, and Nantes, which are significant 4G hotspots. The 4G coverage has grown from 45% at the beginning of 2018 to 76% by the middle of 2020.
- In terms of 5G network services, France saw the deployments of these networks in 2020 for commercial and industrial services from Nokia, Orange Business Services, Free Mobile, Ericsson, and SNCF. According to French government plans, 5G should be available across the country by 2030. All four major operators had planned to install 5G in 3,000 locations by 2022, 8,000 by 2024, and 10,500 by 2025, which will further suggest the exponential generation of raw data in the near future. The 2G and 3G services will be decommissioned by 2026 and 2029, respectively.
- The increased average speed is paving the way for end users, such as e-commerce, and digital banking, to expand their online services for customers. Neobanks, or digital-only banks, are changing how France's banking industry functions in the future. The number of current accounts opened in neobanks has increased by 2.5% from 2018, and France has over 3.5 million active accounts. Nevertheless, 31% of Neobank users want to use banks' services more frequently in the future. Thus, the rise in mobile

data speed is expected to lead to more service-oriented applications among end-user industries and is expected to lead to the growth of data processing facilities in the coming years.

France Data Center Industry Overview

The France Data Center Market is moderately consolidated, with the top five companies occupying 60.47%. The major players in this market are CyrusOne Inc., Equinix Inc., Interxion (Digital Reality Trust Inc.), SOCIETE FRANCAISE DU RADIOTELEPHONE - SFR and Sungard Availability Services LP (sorted alphabetically).

Additional Benefits:

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

Table of Contents:

1 EXECUTIVE SUMMARY & KEY FINDINGS

2 REPORT OFFERS

3 INTRODUCTION
3.1 Study Assumptions & Market Definition
3.2 Scope of the Study?
3.3 Research Methodology

4 MARKET OUTLOOK
4.1 It Load Capacity
4.2 Raised Floor Space
4.3 Colocation Revenue
4.4 Installed Racks
4.5 Rack Space Utilization
4.6 Submarine Cable

5 Key Industry Trends
5.1 Smartphone Users
5.2 Data Traffic Per Smartphone
5.3 Mobile Data Speed
5.4 Broadband Data Speed
5.5 Fiber Connectivity Network
5.6 Regulatory Framework
5.6.1 France
5.7 Value Chain & Distribution Channel Analysis

6 MARKET SEGMENTATION (INCLUDES MARKET SIZE IN VOLUME, FORECASTS UP TO 2030 AND ANALYSIS OF GROWTH PROSPECTS)
6.1 Hotspot
6.1.1 Paris (Ile-De-France)

6.1.2 Rest of France
6.2 Data Center Size
6.2.1 Large
6.2.2 Massive
6.2.3 Medium
6.2.4 Mega
6.2.5 Small
6.3 Tier Type
6.3.1 Tier 1 and 2
6.3.2 Tier 3
6.3.3 Tier 4
6.4 Absorption
6.4.1 Non-Utilized
6.4.2 Utilized
6.4.2.1 By Colocation Type
6.4.2.1.1 Hyperscale
6.4.2.1.2 Retail
6.4.2.1.3 Wholesale
6.4.2.2 By End User
6.4.2.2.1 BFSI
6.4.2.2.2 Cloud
6.4.2.2.3 E-Commerce
6.4.2.2.4 Government
6.4.2.2.5 Manufacturing
6.4.2.2.6 Media & Entertainment
6.4.2.2.7 Telecom
6.4.2.2.8 Other End User

7 COMPETITIVE LANDSCAPE
7.1 Market Share Analysis
7.2 Company Landscape
7.3 Company Profiles (includes Global Level Overview, Market Level Overview, Core Business Segments, Financials, Headcount, Key Information, Market Rank, Market Share, Products and Services, and Analysis of Recent Developments).
7.3.1 Cogent Communications
7.3.2 CyrusOne Inc.
7.3.3 Equinix Inc.
7.3.4 Euclyde Data Centers
7.3.5 Global Switch Holdings Limited
7.3.6 Interxion (Digital Reality Trust Inc.)
7.3.7 Scaleway SAS (Illiad Group)
7.3.8 SOCIETE FRANCAISE DU RADIOTELEPHONE - SFR
7.3.9 Sungard Availability Services LP
7.3.10 Telehouse (KDDI Corporation)
7.3.11 Thesee DataCenter
7.3.12 Zenlayer Inc.
7.4 LIST OF COMPANIES STUDIED

8 KEY STRATEGIC QUESTIONS FOR DATA CENTER CEOS

9 APPENDIX
9.1 Global Overview
9.1.1 Overview
9.1.2 Porter's Five Forces Framework
9.1.3 Global Value Chain Analysis
9.1.4 Global Market Size and DROs
9.2 Sources & References
9.3 List of Tables & Figures
9.4 Primary Insights
9.5 Data Pack
9.6 Glossary of Terms

Scotts International. EU Vat number: PL 6772247784
tel. 0048 603 394 346 e-mail: support@scotts-international.com
www.scotts-international.com

France Data Center - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts (2025 - 2030)

Market Report | 2025-04-28 | 190 pages | Mordor Intelligence

To place an Order with Scotts International:
- - Print this form
- - Complete the relevant blank fields and sign
- - Send as a scanned email to support@scotts-international.com

ORDER FORM:

Select license	License	Price
	Single User License	$4750.00
	Team License (1-7 Users)	$5250.00
	Site License	$6500.00
	Corporate License	$8750.00
	VAT	
	Total	

*Please circle the relevant license option. For any questions please contact support@scotts-international.com or 0048 603 394 346.
** VAT will be added at 23% for Polish based companies, individuals and EU based companies who are unable to provide a valid EU Vat Numbers.

Email*		Phone*	
First Name*		Last Name*	
Job title*			
Company Name*		EU Vat / Tax ID / NIP number*	
Address*		City*	
Zip Code*		Country*	
		Date	2025-05-03
		Signature	

Scotts International. EU Vat number: PL 6772247784
tel. 0048 603 394 346 e-mail: support@scotts-international.com
www.scotts-international.com