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Germany Telecom MNO - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts (2026 - 2031)

Market Report | 2026-01-16 | 79 pages | Mordor Intelligence

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Report description:

Germany Telecom MNO Market Analysis

The Germany Telecom MNO Market was valued at USD 14.25 billion in 2025 and estimated to grow from USD 14.84 billion in 2026 to reach USD 18.19 billion by 2031, at a CAGR of 4.15% during the forecast period (2026-2031).

Network-modernization investments approaching EUR 50 billion through 2030, the federal Gigabit Strategy, and swift 5G standalone roll-outs are sustaining momentum even as economic growth moderates. Operators are prioritizing fiber-to-the-home coverage, fixed-mobile convergence bundles, and AI-enabled network automation to strengthen average revenue per user (ARPU) and cut operating costs. Enterprise digitalization, particularly in manufacturing and automotive clusters, is accelerating premium connectivity demand, while consumer data traffic keeps climbing on the back of streaming. Regulatory pressure, including stringent energy-efficiency rules and spectrum-coverage obligations, is reshaping capital-allocation priorities and nudging smaller players toward partnership or exit.

Germany Telecom MNO Market Trends and Insights

Surging FTTH Build-out and Government Gigabit Targets

Germany's Gigabit Strategy requires 50% of premises to be fiber-connected by 2025 and near-universal coverage by 2030, spurring aggressive capital programs. EUR 3 billion in federal Gigabitforderung 2.0 subsidies accelerates builds in underserved districts, while Deutsche Telekom aims for 10 million additional fiber lines by 2030 and Vodafone leverages Unitymedia assets to pass 25 million homes. Operators with deeper fiber footprints command higher ARPU through multi-play bundles and premium enterprise links. Early deployments create temporary market fragmentation favoring fiber-rich localities, yet nationwide roll-out remains a prerequisite for long-term competitiveness. Successful execution directly lifts German telecom market revenue trajectories by expanding capacity for data-heavy services.

Rapid 5G SA Roll-outs Powering eMBB Demand

All three national carriers met initial 99% coverage targets by 2024, and Deutsche Telekom plans 99% population reach in 2025. Standalone architecture unlocks low-latency network slicing crucial for manufacturing and automotive campuses at BMW, Mercedes-Benz, and Volkswagen sites. Consumers are also driving revenue uplift as mobile data usage rose 30-34% year-over-year across operators, monetized via larger allowances and unlimited plans. Operators gain efficiency from retiring legacy cores and converging frequency layers, which lowers per-gigabyte costs while improving user experience. Early 5G SA adopters therefore secure durable competitive advantages and stimulate incremental German telecom market growth.

MDU Cable-TV Law Slashing Fixed Revenue

The July 2024 repeal of the Nebenkostenprivileg removed automatic inclusion of cable TV in rental bills, exposing Vodafone's MDU subscriber base to direct competition and slashing the cohort from 8.5 million to 4 million accounts. An estimated EUR 800 million in annual revenue is at risk sector-wide, with Tele Columbus losing 40% of TV customers in mere months. Streaming platforms such as Netflix, Amazon Prime, Waipu, and Zattoo now vie for the same households without bearing network costs, intensifying price pressure. Operators must reposition TV within convergent bundles to defend share, yet short-term churn spikes and EBITDA compression remain likely.

Other drivers and restraints analyzed in the detailed report include:

Enterprise Digitalization and Campus-Network UptakeFixed-Mobile Convergence Bundles Boosting ARPUStringent Energy-Efficiency Rules Raising Capex

For complete list of drivers and restraints, kindly check the Table Of Contents.

Segment Analysis

Data and Internet Services delivered USD 6.15 billion in 2025, 43.12% of the German telecom market share, and are CAGR-forecast at 4.33% through 2031 on buoyant video streaming and enterprise cloud connectivity. Operators documented mobile data surges-Vodafone 34% to 1.8 billion GB, Deutsche Telekom 30% to 2.4 billion GB, and O2 beyond 3 billion GB-while fixed consumption surpassed 121 billion GB with average household loads of 275 GB monthly. 5G standalone and fiber upgrades underpin differentiated service tiers that fetch premium pricing from industrial users seeking network-slice guarantees. Consequently, German telecom market size gains at the segment level will continue to eclipse legacy categories.

Voice Services still produced USD 3.91 billion (27.45% share) in 2025, but OTT migration and planned 2G shutdowns by 2028 portend gradual contraction. Telefonica Deutschland already routes 80% of calls via VoLTE, and both Deutsche Telekom and Vodafone are reallocating spectrum to 5G. IoT and M2M Services, worth USD 1.36 billion in 2025, exhibit the fastest 4.45% CAGR, reflecting Germany's leadership in connected-factory and automotive telematics. Pay-TV and other value-added services face direct streaming competition, yet roaming and wholesale traffic are recovering alongside international travel. As data-centric products outpace voice, overall portfolio mix shifts toward higher-growth, margin-accretive categories.

The Germany Telecom MNO Market is Segmented by Service Type (Voice Services, Data and Internet Services, Messaging Services, Iot and M2M Services, OTT and PayTV Services, and More), and End User (Enterprises, and Consumer). The Market Forecasts are Provided in Terms of Value (USD) and Volume (Subscribers).

List of Companies Covered in this Report:

Deutsche Telekom Vodafone Germany O2 Telefonica Deutschland 1&1 AG

Additional Benefits:

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

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