

France Data Center Storage - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts (2024 - 2029)

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Abstracts

The France Data Center Storage Market size is estimated at USD 1.33 billion in 2024, and is expected to reach USD 1.40 billion by 2029, growing at a CAGR of 1.04% during the forecast period (2024-2029).

Key Highlights

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, leading to a growing need for data center storage equipment.

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 Storage Market Trends

IT & Telecommunication Segment to Hold Major Share in the Market

Social networking has become increasingly integral to the lives of French users. Businesses are leveraging social media platforms not only to showcase their products but also to actively engage with customers through recommendations and information sharing. The surge in over-the-top (OTT) subscriptions for smartphones and mobile gaming has led to substantial growth in average data volume. This surge, in turn, is fueling the demand for enhanced data processing and storage facilities, particularly for live gaming and video content.

As digital services continue to increase, businesses are grappling with the generation and processing of larger volumes of data. Consequently, data centers are faced with the imperative to scale their storage infrastructure to accommodate this burgeoning workload. This may involve integrating flash storage and additional drives into existing data centers or constructing new ones. The escalating number of data centers is directly linked to the rising demand for storage devices in IT infrastructure, meeting the burgeoning computing requirements.

Digital usage is experiencing rapid expansion in France, thanks to the swift adoption of internet and smartphone technologies across various business sectors. The per capita purchasing power per person in France has witnessed a notable increase from 0.9% to 2% between 2018 and 2021. This uptick has resulted in a higher number of people able to afford smartphones, contributing to the growing user base. The widespread use of smartphones in the French market is driving a continuous surge in data, necessitating an ever-increasing amount of storage space to manage the influx of data requiring real-time processing and analysis. Data centers play a pivotal role in managing this overwhelming volume of data, becoming crucial to internet infrastructure and economic performance. This surge in demand for data centers is concurrently driving the utilization of storage devices within these centers, positively impacting the market.

The demand for new data centers is witnessing unprecedented growth, particularly with the need for hyperscale facilities required by major internet providers like Amazon Web Services (AWS), Microsoft, and Google Cloud to power their clouds. This trend is set to boost the domestic data center storage market, leading to an increase in market revenue.

The continuous surge in smartphone usage, coupled with the increasing adoption of 5G networks, heightened data traffic, and the booming e-commerce sector, including mobile phone and computer games, is solidifying the dominance of the telecommunications sector. This dominance is poised to have a positive impact on the growth of data centers in the country, consequently escalating the need for data storage. This surge in demand for data storage is driving the necessity for data center storage equipment, thereby contributing to the overall increase in market value.

Hybrid Storage Expected To Hold Significant Share

The combination of on-premises and cloud storage solutions is commonly referred to as data center hybrid storage, leveraging the strengths of both environments and offering flexibility in data storage and management.

The expansion of France's IT infrastructure has received significant funding from the government. Cloud computing services are gaining popularity and attracting investments, driven by emerging technologies such as artificial intelligence, big data, and blockchain. The widespread adoption of the cloud in various businesses is fostering the development of scalable and robust cloud networks through hyperscale data centers. These centers enhance customer satisfaction, increase availability, and reduce costs, leading to the emergence of data centers incorporating hybrid storage.

Hybrid storage introduces a blend of hard drives and SSDs, utilizing cache for frequently accessed data. This approach optimally leverages the fast access capabilities of SSDs and the greater storage capacity of hard drives.

Businesses are transitioning from public cloud to hybrid IT to accommodate their expanding operations and ensure adequate customer service. The growing need for storing and processing intensive data is driving the adoption of hybrid storage solutions. As businesses expand, data centers are adapting to meet the increasing connectivity requirements of diverse industries and the rising prevalence of internet usage. Hybrid infrastructure and cloud capabilities are becoming integral for businesses seeking flexibility, scalability, and support for remote work. With the simultaneous surge in data traffic, the importance of storage for businesses is escalating, consequently contributing to the increased market value of hybrid storage solutions.

Numerous service providers are deploying advanced storage solutions to ensure data availability and access in hybrid clouds. Companies are offering optimized hybrid storage systems, exemplified by products like HPE GreenLake. In 2022, HPE GreenLake introduced platform upgrades and new cloud services, making it a preferred choice for large enterprises with substantial data storage capacities. This trend further fuels the demand for hybrid storage in the country.

France Data Center Storage Industry Overview

The France data center storage market exhibits moderate fragmentation, with a majority of the market share held by key players. Notable contributors include Dell Inc., Hewlett Packard Enterprise, NetApp Inc., Huawei Technologies Co. Ltd., and Kingston Technology Company Inc. These industry leaders employ strategic collaborative initiatives to expand their market share and enhance overall profitability.

In June 2023, Hewlett Packard Enterprise (HPE) significantly broadened its product portfolio by integrating Software as a Service (SaaS) and Network as a Service (NaaS) offerings into HPE GreenLake. Furthermore, HPE introduced its SaaS products on the AWS Marketplace. The expansion includes the availability of the HPE Aruba Networking CX 8000, HPE Aruba Networking 9000, and HPE Aruba Networking 10000 Series data center switching portfolio via Network as a Service (NaaS). HPE's introduction of two new service packs within HPE GreenLake for Aruba networking enables partners to venture into data center networking. This allows them to bundle design and delivery services with a monthly NaaS technology subscription, offering customers a comprehensive compute, storage, and networking data center stack through HPE GreenLake.

In February 2023, NetApp made significant strides in the market by launching the NetApp AFF C-Series. This new family of capacity flash storage options provides cost-effective, all-flash storage solutions. Additionally, NetApp introduced the AFF A150, an entry-level storage system within the AFF A-Series family of all-flash systems.

These developments showcase the dynamism within the France Data Center Storage market, with key players continuously innovating and expanding their offerings to meet the evolving needs of customers.

Additional Benefits:

The market estimate (ME) sheet in Excel format

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