

OBSERVATORY



● **The .fr  
in 2025**

Annual Review

March 2026

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# Definitions



**ccTLD (country-code Top-Level Domain):** a TLD specific to a country or territory. The ccTLD for France is .FR, but there are other French ccTLDs such as .RE (Réunion), .PM (Saint Pierre and Miquelon), etc.

**Creation rate:** the creation rate represents the percentage of names created during the year in stock at year-end.

**gTLD (generic Top-Level Domain):** a generic TLD, not attached to a particular country or territory. .COM, .NET and .ORG are gTLDs.

**Legacy gTLD:** generic TLD created before 2014. Examples include .COM, .NET, .ORG or more recently (2001-2004) .INFO, .BIZ, .MOBI, etc.

**nTLD (new Top-Level Domain):** generic TLD created after 2014. nTLDs are divided into several sub-segments such as geoTLDs (regions, cities, etc.), Community TLDs (community-based), .BRANDs (TLD suffix corresponding to major brands) or generic nTLDs (common dictionary terms).

**Retention rate:** The retention rate is calculated using the following formula:  $(\text{Stock } 01/01/26 - \text{Create operations } 2025) / \text{Stock } 01/01/25$ . It therefore measures the proportion of names present at 1 January 2025 that were still present at 1 January 2026. Purists distinguish between this retention rate and the renewal

rate, which measures the number of names renewed as a proportion of all those expiring in the period considered. For reasons of benchmarking, we prefer to use the retention rate, which can be calculated without having expiry dates for renewed names.

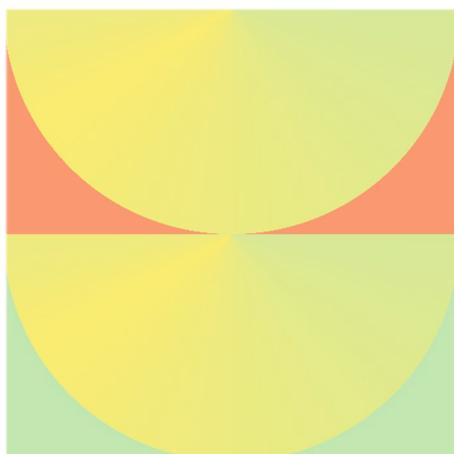
**TLD (Top-Level Domain):** a domain at the highest level in the hierarchical Domain Name System of the Internet after the root domain. .FR and .ORG are top-level domains.

# Preamble

As registry for the .FR Top Level Domain, Afnic is well placed to observe the adaptation of French society, particularly from the standpoint of the digital transition process.

Looking just at the domain names market in France, the consolidation of certain benefits of the digital transformation was once again confirmed in 2025. The all-time record for the number of .FR create operations established in 2024 (802,000) was thus exceeded (853,000).

This report details the activity of .FR over the past months. It also throws some light on how to read the more general trends while attempting to anticipate how they might evolve in 2026.



# Summary



At 31 December 2025, the .FR domain had **4,319,120** names in stock, compared with 4,216,786 at 31 December 2024.



Its **growth** rose from 2.0% in 2024 to **2.4% in 2025**, with create operations up by 6.3% (compared with 0.1% in 2024) and delete operations up by 4.3% (compared with 5.2% in 2024).

These changes are the result of the sharp acceleration of the digital transformation during the COVID-19 crisis, which has become embedded in digital practices.



The market share of .FR in France is showing a slight decline, stabilising at **40.35%** compared with 40.44% at year-end 2024.

An almost inevitable consequence of the high level of create operations (causing increased volatility), the **retention rate continued on its downward trend, at 82.2%** as against 82.6% in 2024 despite the introduction of multi-year registration offers by large registrars. The impact of these offers can be seen in an improved retention rate in the last weeks of 2025, an improvement which has not yet offset the long-term downward trend.

The ageing structure of .FR domain names has hitherto contributed to their stability, but despite the impact of multi-year names, **the delete rate for names reaching expiry for the first time (at the end of the first year) remained lower than usual in 2025 (66% in 2025 as against 67% in 2024 and 68% the previous years).** This could shift in 2026 however, with the introduction of multi-year offers by large registrars which are impacting the retention rate, especially at the time of the first-year anniversary of a domain name's creation.

**The .FR TLD has continued to experience a 'deconcentration' effect,** with a lower concentration of create operations compared with the stock of names. This trend persisted in 2025 with a relative lag among the market leaders in comparison to their challengers, a situation that was also reflected in the inter-registrar transfer flows.

**The regional dynamics still reflect a 'catch up' of some rural regions in terms of growth,** although the weight of the regions in the portfolio of .FR names registered varies little and is linked to the presence of big urban and economic centres. Over the long term, Île de France (the Greater Paris Region) is the big loser, down -5.3 points in terms of market share between 2015 and 2025, even though it is still the region with by far the greatest number of .FR names (27% of the stock).

**The number of .FR domains registered by holders abroad (European Union)** continues to rise relatively sharply, currently accounting for 11.9% of stock and **15.7% of create operations in 2025.**

**There has been exponential growth in multi-year name registrations, up from 3% in 2023 to 14% in 2025,** with a preference for the 3-year maturity option. Multi-year names accounted for 9.7% of stock at the end of 2024, and 10.7% at year-end 2025. This phenomenon has a significant impact on the retention rate; a positive

effect up until 2027, but one that is difficult to estimate further down the line given its recent nature.

**.FR creations remain connected to business startups, although this relationship cannot be systematically confirmed.** Business failures appear to have stabilised in 2025, but remain at the high rate recorded in 2024. This contextual factor is directly linked to both the after-effects of the COVID period and economic difficulties, and can play a role in developments in the domain name market by causing names to be abandoned and slowing the create rate. However, the bleak climate can also lead companies to seek out new distribution channels via the Internet, which boosts startups of businesses who are now well on the way to making the digital transition. In 2025 as in 2024, it was this second scenario that proved true for the .FR TLD.

# 1. Growth of the .FR



Growth of the .FR in 2025: +2.4%

This growth comes on the back of the anomalous years of 2020 (impact of COVID-19, +7.0%), 2021 (gradual return to normality, +5.8%), 2022 (end of the return to normality, +2.9%), 2023 (boom in create operations, +3.4%) and 2024 (downturn accompanied by stabilising creations, +2.0%).

The key development of 2025 was the **sharp rise in create operations: +6.3%**.

Creations have reached a **new all-time high at 853,000**. These creations contribute to the increase in stock in the context of a falling retention rate.

Despite not having materialised in 2025, the uncertainties linked to create operations returning to previous levels, combined with rising deletions, remain extant. In the event that this pessimistic scenario comes to pass, stock would be exposed to a risk of high losses.

The growth of the .FR TLD was slightly below that of the French market in 2025 (2.4% as against 2.6%) which grew significantly (from 1.6% in 2024) driven by a dynamic .COM TLD.

Growth of EU ccTLDs (excluding .UK), improved slightly in 2025, at +0.7% compared with +0.4% in 2024.

The global market, meanwhile, continued to grow at +5.0% in 2025 (estimation) as against +3.1% in 2024 and +2.7% in 2023, in large part due to nTLDs and the turnaround for the .COM TLD.

Following a period of convergence between the different segments in 2022–2023, the contrasts observed in 2024 were further heightened in 2025, with European ccTLDs still struggling as a whole in a context of strong momentum among the other segments, while growth of the .FR TLD remained in the mid-range.

### Change in annual growth rates

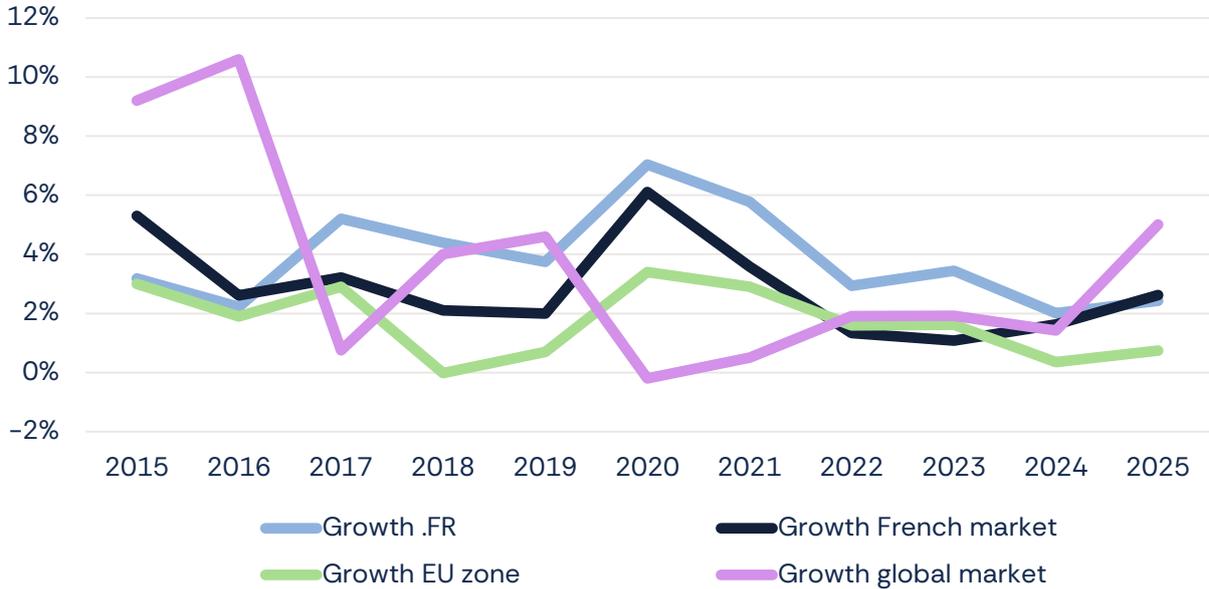


Figure 1: Change in annual growth rates (2015 – 2025)

(Key figures table for Figure 1)

## 2. Market share in France



Having grown slightly faster than its local market in 2025 (see Figure 1), **the market share of the .FR domain stood at 40.35% at the end of 2025** (compared with 40.44% at the end of 2024).

This market share remains very close to the all-time high for the .FR TLD.

The drop in market share amounted to 0.09 of a percentage point (pp) in 2025, whereas the .COM TLD gained 0.6 pp. The differential between the two TLDs thus shifted to the advantage of .COM in 2025 (from 3.1 to 3.7).

	2021	2022	2023	2024	2025	Total
.FR	0.8	0.6	0.9	0.2	-0.1	<b>2.4</b>
.COM	0.6	-0.5	-0.8	-0.2	0.6	<b>-0.4</b>
Other Legacy TLDs	-0.3	-0.3	-0.2	-0.2	0.3	<b>-0.8</b>
Other ccTLDs	-0.2	-0.1	0.0	-0.1	0.1	<b>-0.3</b>
nTLDs	-0.9	0.3	0.1	0.3	-0.8	<b>-0.9</b>

Table 1: Changes in market share in France (2021 – 2025)

Table 1 shows the gains and losses in market share over the past five years. During this period, the situation of the .FR TLD improved with a total gain of 2.4 pp. The .COM domain for its part lost -0.4 pp (despite the strong recovery in 2025), Other Legacies lost 0.8 pp, Other ccTLDs lost 0.3 pp and nTLDs lost 0.9 pp.

The .FR TLD demonstrated strong momentum in 2025 which helped it withstand stronger performances than its own, against the backdrop of the particular circumstances largely brought about by Verisign’s promotional operations on the .COM TLD. These operations have been stepped up since year-end 2024, and have a real success in terms of creations. Yet these same creations will expire as of early 2026. Until then, it will not be possible to determine whether the Verisign operations have had a long-term positive effect on .COM.



These multi-annual data show a **constant preference over time in France for the .FR domain.**

Market share gains in the other segments (Other Legacy TLDs, other ccTLDs) in 2025 can be explained by an upturn following several lacklustre years thanks to the campaigns of registries that have followed the example of Verisign, campaigns which have paid off up until now at least.

More surprising is the case of nTLDs, insofar as momentum was very strong in the segment globally. The same was not true in France, however, possibly a sign that the French market is less inclined towards the big low cost nTLDs which sometimes facilitate abusive practices.

### Changes in market share in France

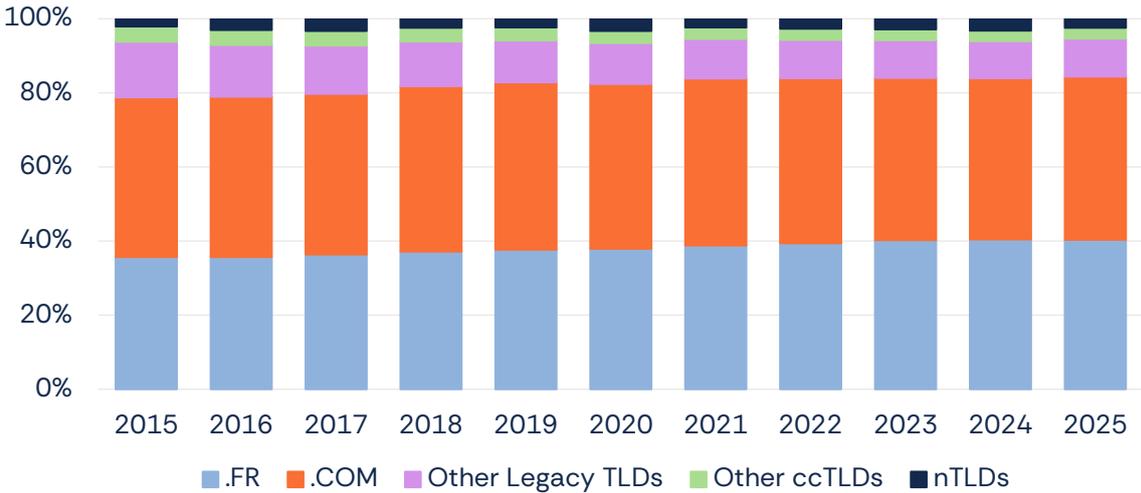


Figure 2: Change in market share in France (2015 – 2025)

(Key figures table for Figure 2)

*Data for TLDs other than .FR are estimates provided by ZookNIC.*

Figure 2 shows that over a long period, the reality of the market is that of use, and that the great challenge for 'secondary' TLDs such as Other Legacy TLDs, or

newcomers to the market such as nTLDs, is how to anchor themselves in real uses.

As a result, the durability and the success of a TLD are less measurable by the volumes of stocks or the creation dynamics than by the use actually made of the names. Unfortunately, this dimension is also one of the most difficult to evaluate. Afnic's teams have launched an initiative to collect the data required for the study, and tangible elements should soon be available.

# 3. Activity of the .FR



.FR activity was marked by a substantial increase in **create operations in 2025, at +6.3%**, establishing a **new all-time high of 853,000 new .FR domain names** compared with 802,000 in 2024.

**Deletions, meanwhile, increased by 4.3%** (as against +8.4% in 2024), with a resulting deterioration in the retention rate, which fell from 82.6% to 82.2% in 2025, for an average of 83.3% over the period 2021–2025.

The good level of create operations proves that the acceleration of the digital transformation has become a permanent factor rather than a phenomenon. It also stems from the emergence of dynamic actors on the French market who have been able to face down the traditional leaders, resulting, as we will see below, in a pronounced trend towards the deconcentration of the .FR TLD.

Despite slowing, the increase in delete operations in 2025 (+4.3%) remained above the growth in stock in 2024 (+2.0%). This reflects ongoing tension in delete operations, causing the increased volatility of the TLD.

Beyond the 'disappointments' of the digital transition, the economic context may explain this phenomenon. This is all the more true in that business failures remained at the 2024 level in 2025, exceptionally high compared with 2019-2023 (see Chapter 12 for further detail).

Table 2 shows the differences by type of flow.

Flows	2024	2025	Change (abs.)	Change (%)
Create operations	802,202	852,936	50,734	6.3%
Net delete operations <sup>1</sup>	719,302	752,392	+31,090	+4.3%
Net balance	82,954	102,334	+19,644	+23.7%

Table 2: Flows of .FR activity in 2025

Figure 3 presents the trends in .FR flows since 2015 and shows the historic levels of create and delete operations and the net balance.

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<sup>1</sup> Net delete operations correspond to gross delete operations less operations to 'restore' names deleted then kept by their holders, plus the delete operations carried out at the initiative of Afnic, notably in the context of verification operations.

## Change in .FR activity

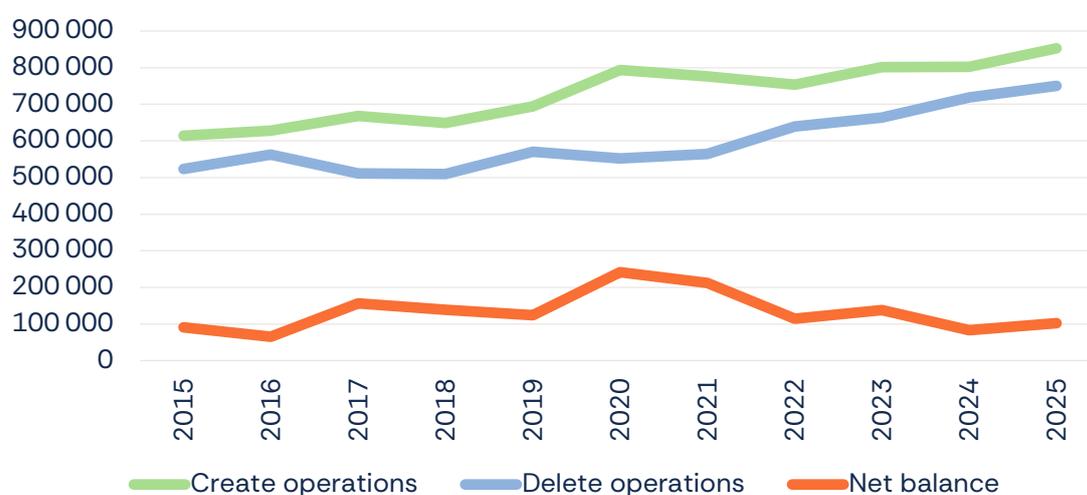


Figure 3: Change in .FR activity (2015 – 2025)

### (Key figures table for Figure 3)

Following a peak in 2012, create operations fluctuated between 600,000 and 700,000 per year from 2013 to 2019. They exceeded 700,000 in 2020 and were stable above this threshold in 2021 and 2022, before passing the 800,000 mark in 2023 and remaining at this historic level in 2024. Create operations in 2025 exceeded the 850,000 mark.

Delete operations, meanwhile, were in the range of 500,000 to 600,000 a year between 2013 and 2021, with two peaks in 2016 and 2019 associated with specific one-off incidents. Delete operations exceeded 600,000 in number in 2022, 700,000 in 2024 and 750,000 in 2025, entailing a fall in the retention rate to 82.2% in 2025.

# 4. Structure of the .FR net balance

A study of the components of the net balance and their changes highlights the dynamics underlying the performance characteristics discussed above.

Figure 4 shows the variations in domain name renew and create operations from one year to another, their addition forming the net balance.

The variation in renew operations was positive in all years from 2012 to 2025, reflecting the fact that the absolute number of domain name renewals continued to grow (2021 being the first year in which more than three million .FR names were renewed, a figure that stood at 3,466,000 in 2025.)

Not surprisingly, the change in the volume of names renewed correlates with the changes in the net balance, which explains the slower growth.

## Structure of the .FR net balance

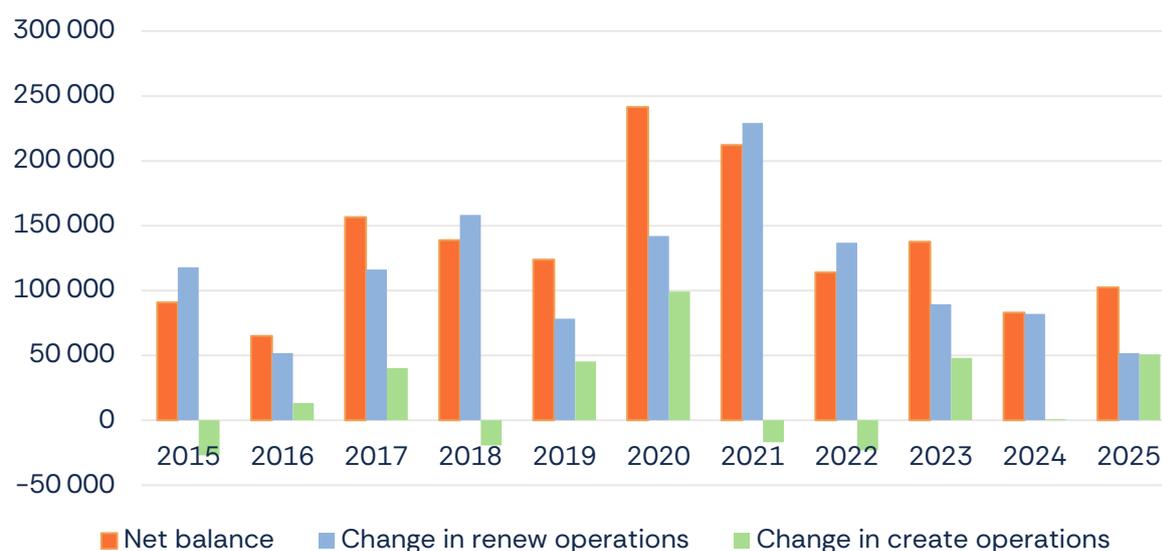


Figure 4: Structure of the .FR net balance (2015 – 2025)

### (Key figures table for Figure 4)

Following a two-year decline, create operations experienced a marked upturn in 2023 and 2025, intersected by a stabilisation in 2024.

In 2025, the positive variation of 100,000 names in the net balance was evenly split between create and renew variations.

A study of the key parameters of the .FR TLD helps to explain these factors and to illustrate the reasoning behind activity forecasts.

# 5. Key parameters of the .FR

## 5.1. A rising creation rate in 2025

The creation rate represents the percentage of names created during the year in stock at year-end.

The 'younger' or more 'dynamic' a TLD, the higher its creation rate. This rate tends to reduce over time, since the stock of names increases from year to year. The effort needed in terms of create operations (in absolute value) in order to maintain a similar rate from one year to the next is therefore automatically ever greater.

Figure 5 demonstrates that the creation rate for the .FR TLD plateaued at 21% in 2015-2017, before declining in 2018 and returning to an upward trend in 2019 and 2020 (the effect of COVID is evident in the latter year). This trend did not continue in 2021 and 2022, however, with a creation rate falling to around 19%. The exceptional level of create operations in 2023 allowed it to rise above 19%

once again before stabilising at 18% in 2024, then rebounding to almost 20% in 2025.

## Change in the .FR creation rate



Figure 5: Change in the .FR creation rate (2015–2025)

(Key figures table for Figure 5)

Looking back at the scenarios previously posited in terms of possible developments, in order to assess their relevance, there are two possibilities:

- 1) an optimistic scenario in which the digital transformation initiated in 2020 continued, sustaining the dynamic of create operations;
- 2) a pessimistic scenario in which the slow pace of economic activity reduced investment and discouraged potential project promoters from starting up new businesses.

The 2025 performance shows that the .FR domain has continued on an optimistic path, which does not mean however that this can last for ever. We previously stated in the 2024 edition of this Annual Review that *"Holding the*

retention rate at around 18% in 2025 would be a success in itself, given that while stock is on the increase, more create operations are needed to maintain a constant creation rate.” This observation holds true today, and the voluntarily conservative assumptions of 2026 set this creation rate at around 18.25%.

The weekly trend in create operations shown in Figure 6 indicates that create operations were higher in 2025 than in 2024 for the year as a whole. This increase of 50,000 names is therefore not the result of a one-off large-scale operation; on the contrary, it reflects continuous growth in create operations.

Long-standing seasonal trends remain distinct, with ‘slow’ months in July and August, an upsurge in September, and a drastic fall in the second half of December.

### Weekly .FR create operations in 2024 and 2025

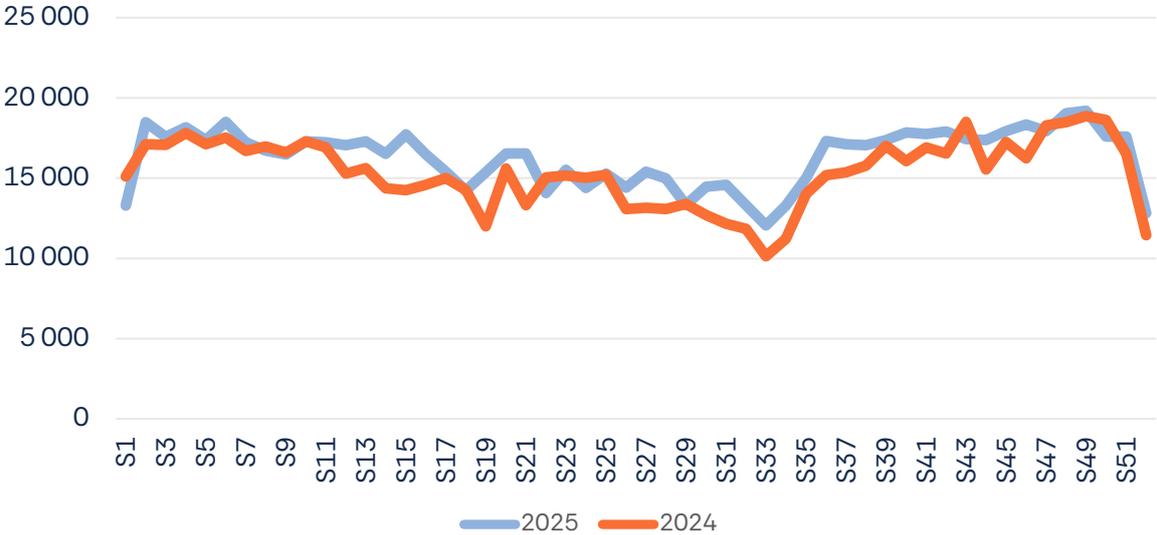


Figure 6 – Levels of weekly .FR create operations in 2024 and 2025

(Key figures table for Figure 6)

## 5.2. A declining retention rate in 2025

The retention rate is calculated by subtracting the number of create operations during the year from the stock at year-end and comparing that balance with the stock at the beginning of the same year. It therefore measures the proportion of names in the portfolio at the start of the year that were still there, i.e. had not been deleted, at year-end.

This retention rate has fallen since 2022 due to the number of delete operations increasing more quickly than the previous year's stock of names.

### Change in .FR Retention Rate

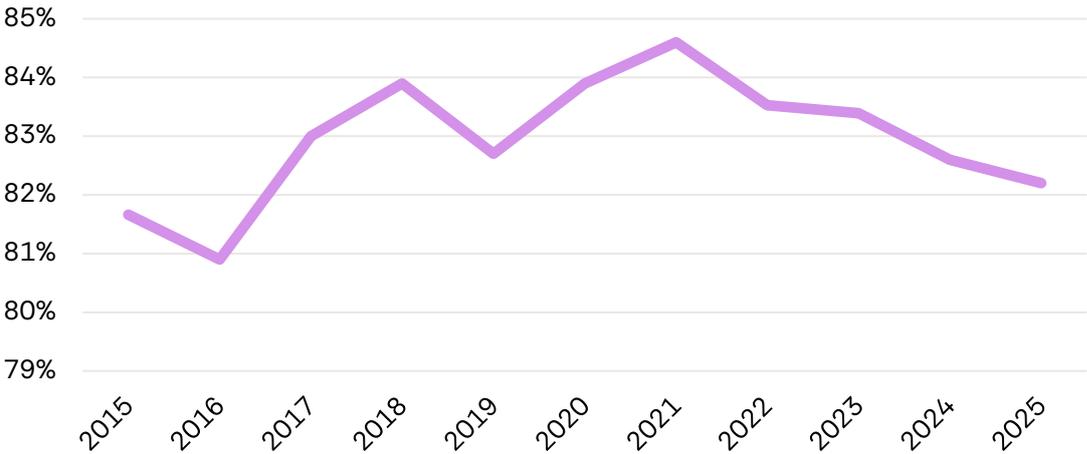


Figure 7: Change in .FR retention rate

(Key figures table for Figure 7)

Figure 7 shows that this rate rose significantly over a long period, reaching 84.5% in 2021 (names registered during COVID and still in use one year later). There were fits and starts to this progression connected with one-off events

(introduction of automatic renewal systems by some large registrars, deletion of non-eligible domainer portfolios, etc.).

The sustained deletions of 2022–2024 (impact of the ‘return to normality’ after the COVID effect) weighed on the renewal rate, which returned to the 83%–84% range in which it oscillated between 2017 and 2020, then fell below 83% in 2024 before moving towards the 82% mark in 2025.

There are four main causes of this change in deletions:

- the growth in stock, which automatically increases the number of names reaching expiry and therefore the number of delete operations;
- greater domain name volatility caused by the high level of create operations. This volatility reflects more opportunistic registrations, which is seen in the historically low retention rate for names reaching expiry for the first time;
- the mid-term consequences of the ‘COVID effect’ that forced many companies to put in place an online presence in 2020–2021, with a ‘return to normality’ in 2022–2024 that led to the abandonment of websites created during the crisis;
- the economic situation and (as we will see below) the high level of business failures, partly due to a ‘catch-up’ effect from the COVID period during which non-viable companies were able to survive thanks to government aid.

Although the last two causes should peter out over time, the first two should remain in effect in 2026.

Lastly, the high level of create operations between 2023 and 2024 represents a challenge in itself, given that the domain name renewal rate after the first year

has a significant impact on the overall renewal rate (as at 31/12/2025, names created that year represented 19% of the stock of .FR).

A new factor could impact the traditional mechanics underpinning the retention rate: the emergence of 'multi-year' options since the end of 2024 in the commercial offers of some large registrars. We thus observed that the share of multi-year names rose from 4% in 2023 to 14% in 2025, with a high proportion on a three-year maturity. The names created at the end of 2024 will therefore not expire in 2025, but in 2027; likewise for the names created in 2025 under these offers, which will come up for renewal in 2028, etc. In the meantime, with a few exceptions, they will be retained 'by default' in 2025 and 2026, then 2027 (for the names created in 2025), etc., thereby positively impacting the retention rate. This impact began to materialise as of December 2024, when the retention rate suddenly rose from 82.07% at the end of November to 82.2% at the end of December. But its effects will become more prominent in 2026.

The structure of the .FR portfolio, based on creation date and expiry dates, is therefore a key factor in understanding the mechanism. We will first examine the structure by date of creation, the structure by expiry date being covered in Chapter 11.

### 5.3. Distribution of .FR names by age, an explanatory factor

Figure 8 hereunder shows the distribution of extant .FR domain names by age at 31 December 2025. Names created in 2025 are 0 years old, those created in 2024 one year old and so on.

#### Structure of .FR names by age

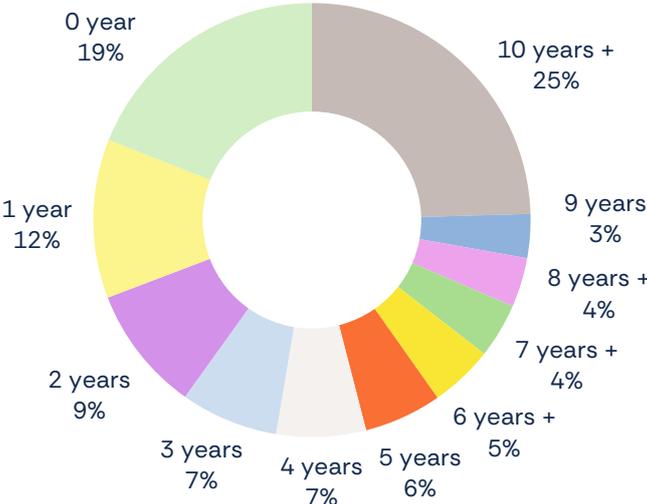


Figure 8: Structure of .FR names by age at 31 December 2025

(Key figures table for Figure 8)

This structure has remained highly stable over time, names created during the past year generally representing just under 20% of the stock (corresponding to the creation rate). Three tiers can be distinguished: names created in 2024 and 2025 (31% as against 30% at 31/12/24), names registered for two to six years

(34% in 2025 and as against 34% in 2023) and those that are seven or more years old (36% as against 35%).

The weight of 'old' names thus increased slightly, which had a stabilising effect on the overall retention rate for .FR insofar as their retention rate is higher than that of 'younger' names. Indeed, the age structure of .FR names has a direct effect on the TLD's retention rate, since this rate varies with the age of the domain names (see Figure 9). This impact was not sufficient, however, in 2025 to offset the surge in volatility of the most recently registered names.

### FR - Retention rate and names by age in 2025

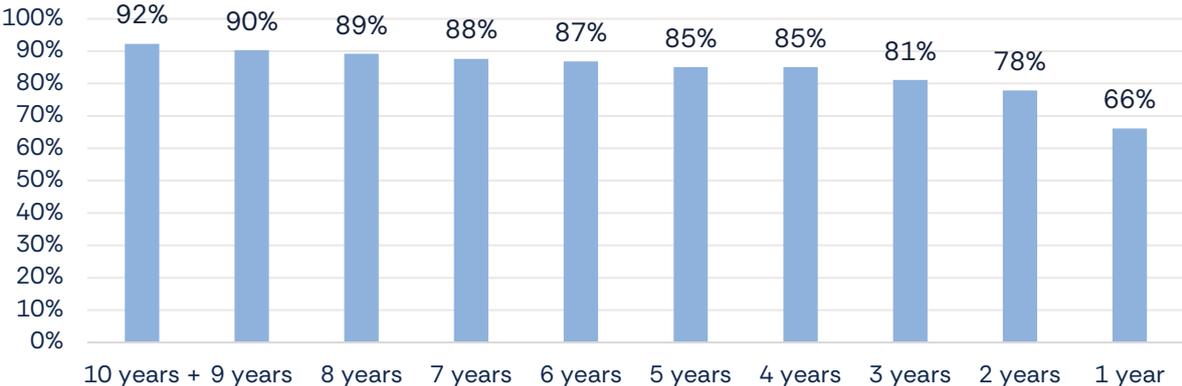


Figure 9: Retention rate by age of .FR names in 2025

(Key figures table for Figure 9)

The retention rate in year 1 (first renewal) was 66% in 2025 (as against 67% in 2024). This rate increases to 80% in year 3 and over 90% for names registered for 10 years and more. A domain name retained for several years has an ever-greater probability of being retained in the future. For names 9 years old and over, the retention rate is equal to or above 90%.

The low retention rate in year one at end-2025 (67%, as against an overall rate of 82.2% for .FR) indicates that registrars could conduct effective loyalty campaigns in the run-up to this first anniversary when the expected gains (renewal of names) are highest. 'Multi-year' offers are an effective way of encouraging holders to use their names and to keep them over a number of years, which could result in better retention rates for 'younger' names in the long term.

The retention rate is never 100%, reflecting the existence of a phenomenon of natural erosion, which decreases as the names age. But the 'quality' of domain names is also an issue. Up until 2023, for example, a 90% retention rate was achieved as of the fifth year, whereas in 2025, over 90% of names aged 9 years and over were renewed (6 years and over in 2024). The weak first-year retention rate is therefore spreading across the .FR structure, gradually lowering the retention rate by age. This phenomenon offsets the automatic increase in retention rate as portfolios age. The balance between these two competing effects depends on the change in retention rate.

Historically, the first-year retention rate has not exceeded 70% since at least 2016, staying within the range of 68%–70% between 2017 and 2022. It then fell drastically in 2023 due to more volatile creations in 2022. In 2024, the situation improved somewhat, before returning to 67% in 2025.

# 5.4. Change in the number of .FR names since 1998

Figure 10 highlights the impacts of the various waves of openings (2004, 2006 and 2011) and of the pandemic (2020/2021) on the growth of the .FR TLD.

## Change in the number of .FR names

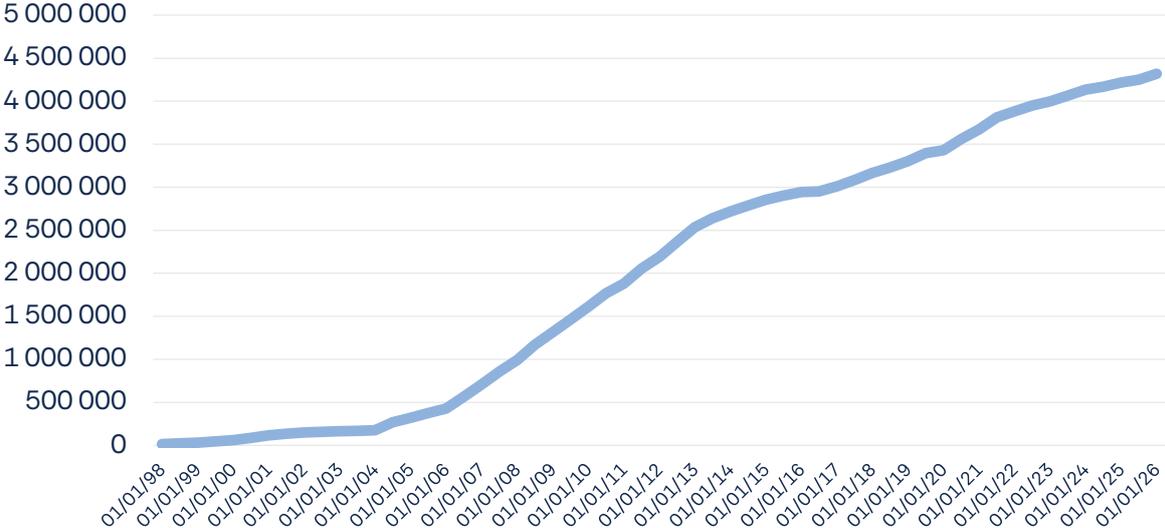


Figure 10: Change in the number of .FR names, 1998–2025

(Key figures table for Figure 10)

The easing of the ‘right to the name’ in May 2004, i.e. the abandonment of the requirement to substantiate a right to the name filed, was the first factor in the acceleration of growth. But the determining factor was the opening in 2006 to private individuals, the two ‘openings’ combining their effects until 2013, with the opening up to the European Union in 2011 not having any substantial effect.

From 2013 onwards, growth slowed, and it was not until early 2017 that the .FR TLD crossed the 3 million mark. The pace remained strong in 2018 and 2019 and stepped up again in 2020 due to the pandemic and the lockdowns; the

3.5 million mark was passed in the second half of 2020. In 2021, the gradient remained strong albeit with an appreciable inflection. The number of .FR domain names exceeded the 4 million mark in December 2022.

In 2023 and 2024, stock continued on the 2022 trend, slowing in 2024 then rebounding in 2025 thanks to 'good' creations to reach 4,319,120 names at 31/12/2025.

# 6. .FR market concentration

The concentration index for the .FR domain is calculated by taking the sum of the squares of the market shares of the top 10 registrars (using the HHI or Herfindahl-Hirschmann Index).

## Concentration rate (HHI) of the top 10 .FR registrars

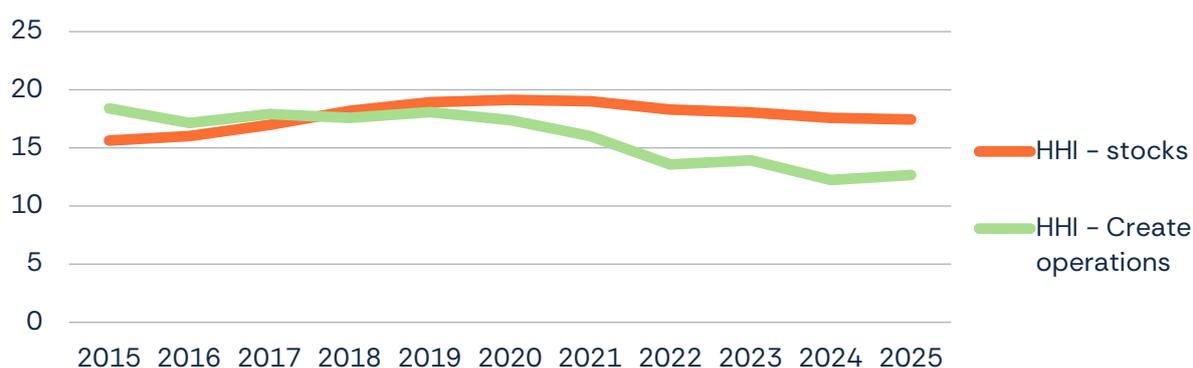


Figure 11: Concentration rate (HHI) of the top 10 registrars (2015 – 2025)

(Key figures table for Figure 11)

Figure 11 shows the changes in the concentration of the .FR market since 2015.

At present, in terms of the HHI nomenclature, the .FR TLD is still considered a moderately concentrated market. However, it could be considered to be significantly concentrated if the index moves beyond 20, a situation that almost occurred in 2020.

The HHI Stock curve increased up until 2019, stabilised in 2020–2021 and declined in 2022–2025 under the effect of the evolution of the HHI Create Operations index. This index fell below the Stock index as of 2018, but the stall really began in 2020 and lasted until 2022. The index began to move up again in 2023 before returning, in 2024, to the downward trend begun in 2018. In 2025 the index was once again on a rising trend, implying that the leading registrars had greater difficulty in recent years coping with the strong momentum of certain ‘challengers’, at least in terms of create operations. Yet this trend was reversed in 2025, largely because one of the challengers moved into the top 10 at the expense of one of the long-standing leaders.

We are thus still in a market deconcentration phase, the HHI Stock index reacting slower due to the names registered that in practice constitute ‘entrenched positions’ for registrars, the share of names moving from one registrar to another remaining marginal (see Figure 12). This share did not exceed 2.5% between 2015 and 2025, with the exception of 2020 (3.5%).

## Percentage of .FR names transferred between registrars

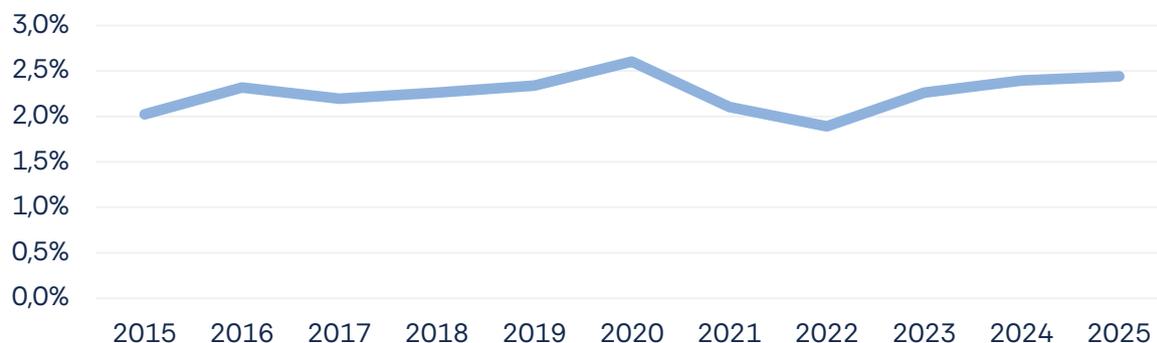


Figure 12: Percentage of domain names transferred between registrars (2015–2025)

(Key figures table for Figure 12)

The portfolios are therefore stable overall, changes being dictated, as far as registrars are concerned, by the combined effects of create operations and renewals more than by the flow of customers won or lost. This does not, however, exclude one-off phenomena, sometimes having a substantial effect on the scale of a single registrar, but which ultimately 'redistribute' market share to a very small extent.

These relatively flat inter-registrar transfer rates indicate that the French domain names market is still a growth market, in which competitors' efforts are focused more on creations than on other registrars' existing clients.

As the market enters its mature phase (with balanced stock or slightly down) the inter-registrar transfer rate is likely to increase, reflecting increased competition for existing clients, the objective of some registrars being to gain market share by

enticing their competitors' clients away. Once again, this phenomenon can already be seen but does not concern significant volumes.

Indeed, this strategy comes up against a number of obstacles: domain names are often associated with various online presence services, which changing registrar may affect, so this would be a brake on any decision to transfer.

Within a context of heightened competition, price policies become a deciding factor, either guaranteeing customer loyalty or pushing clients to take advantage of lower fees elsewhere. Yet aggressive pricing policies lead to an increase in the cost of client acquisition, which can only be offset by selling service packages including domain names or by charging higher renewal rates relative to the initial transfer rate or creation rate, which in turn increases the volatility of the portfolio (increase in potential abandonments) and fuels the inter-registrar transfer dynamic.

A clear price elasticity is at work in the registrar segment targeting the public at large. One of the leaders increased their prices sharply in 2023, which had the instant knock-on effect of lowering creations and incoming transfers, accompanied by greater deletions and outgoing transfers. This strategic choice, likely in accordance with internal objectives, proved that, unsurprisingly, price remains an important factor for private individuals and VES/SMEs at least.

Placed as they are at the very heart of online presence, domain names in themselves are not, however, subject to intense competition among players, as is shown by an analysis of inter-registrar transfer flows.

2025	Incoming transfers			
Outgoing transfers	3 leaders	Others	Total	Percentage
3 leaders	18,005	29,662	47,667	46%
Others	20,067	35,258	55,325	54%
Total	38,072	64,920	102,992	
%	37%	63%		

Table 3: Inter-registrar transfers

In 2025, out of 102,992 transfers between registrars, 38,072 (37% as against 37% in 2024, 38% in 2023, 45% in 2022, 42% in 2021 and 30% in 2020) were to one of the three leaders, whereas these same leaders lost 47,667 names (46% of the total, as against 47% in 2024, 43% in 2023, 39% in 2022, 37% in 2021 and 25% in 2020) to other registrars.

The net balance of transfers therefore came to 9,595 names to the detriment of the three leaders (9% of the total) compared with 9,349 names in 2024 and 4,222 names in 2023 (4.7%).

Inter-registrar transfer flows	2023	2024	2025
3 leaders to the 3 leaders	18%	18%	17%
Other registrars to the 3 leaders	21%	19%	19%
3 leaders to other registrars	25%	29%	29%
Other registrars to other registrars	36%	35%	34%

Table 4: Flows of transfers between the three leading registrars and other registrars (2023–2025)

A study of the flow of exchanges over the period 2023–2025 shows that transfers between the three leading registrars are relatively stable in terms of percentage (17–18%), whereas incoming flows from other registrars towards these three have declined abruptly (19% in 2024 as against 21% in 2023, and 26% in 2022 for reference). Outgoing flows from the three leaders to other registrars have stabilised at 29% following two years of strong growth (up from 20% to 25% in 2023, then at 29% in 2024). Transfers between other registrars are stable at 34–36% of the total.

Since 2022, the three leaders (as a whole) have been losing clients to the other registrars while the other registrars' clients are turning less often to the leaders when they change registrar.

Although the volumes involved remain modest, this phenomenon is eroding the market share of the three leaders and contributing to the deconcentration of the .FR domain.

This phenomenon may well be a one-off, and in fact brought about by one of the three leaders alone rather than by its two competitors. But it could also be a sign that the leaders' offers are under threat from more commercially aggressive challengers, or more innovative in terms of services.

The transfer flow phenomenon also sheds light on the growing stakes linked to reseller networks, which can transfer from one to another the domain name portfolios that their customers have entrusted them to manage.

## Market shares of the three leading registrars in stock and in create operations

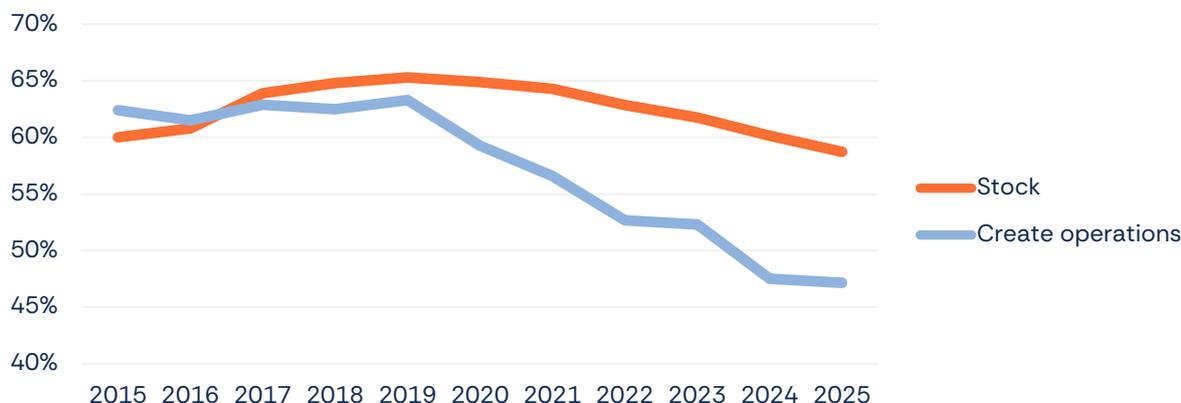


Figure 13: Market shares of the three leading registrars in .FR stock and create operations (2015–2025)

(Key figures table for Figure 13)

The three leaders remain in a position of power in the .FR market, even though their overall market share is crumbling in the context of the gradual deconcentration of the .FR market.

Figure 13 hereunder shows the trends since 2013 in the market shares of the top three players, in terms of stock and create operations. It illustrates that the deconcentration episode (where the concentration of create operations is below that of the stock) began for these three in 2017, with the concentration of stock continuing to grow, reaching a peak at 65.3% in 2019 before declining in 2020 and falling 6.6 pp in 2025 from the 2019 peak level. The market share of stock of the three leaders also fell below 60% in 2025, a level not seen since 2015. Create operations, meanwhile, fell over the same period from 63.3% to 47.2%, i.e. – 16.1 pp.

This evolution is relatively similar to that seen for .FR as a whole, demonstrating that this trend is largely determined by the performances of the three leading registrars.

These data indicate that it is not the major leaders that have benefited most from the effects of COVID and the acceleration of the digital transformation. The current sharp differential between creations (47.2%) and stocks (58.7%) highlights the relative slowdown of the three leaders as a whole in the most competitive market segment, that of creations (although this should be looked at in the context of the pricing policy of one of the three). Despite their significantly more modest size, their challengers have likely managed to come up with offerings better adapted to the current conditions in terms of pricing, services, etc. In the medium and long term, these offers also influence retention rates and transfers, impacting the market share of the three leaders in terms of stock.

The weight of the three leading .FR registrars – which together account for 60% of the .FR domain – in .FR activity remains considerable in view of the number of registrars active in this TLD.

But their share of creations, below 50% in the last two years, is a strong sign of profound change in the key success factors of the .FR domain names market in France.

# 7. Geographical distribution of .FR nationwide

Table 5 shows that all regions once again posted growth with the exception of Île de France.

The Grand-Est, Bourgogne Franche-Comté and Pays de la Loire regions saw their stock increase, but their growth was below that of the .FR TLD overall. The regions that outperformed .FR were Nouvelle Aquitaine, Auvergne Rhône Alpes, Brittany, Centre Val de Loire, Corsica, Occitanie, Hauts de France, Normandy and Provence Alpes Côte d'Azur.

The French overseas territories, which outperformed .FR in 2024 as the result of unusual creation phenomena, underperformed in 2025 due to deletions of these created names.

The 'catch-up' phenomenon experienced by a certain number of regions since COVID-19 continued in 2025, the Île de France region presenting the paradoxical situation of being both the strongest in terms of market share (27%) and the weakest in terms of growth (-0.2%).

Region	2025	Var. 2025	Mkt Share 2025	Chg. (*)
Grand-Est	232	2.0%	5%	-0.4
Nouvelle Aquitaine	301	3.5%	7%	+0.3
Auvergne Rhône-Alpes	511	2.5%	12%	0.4
Bourgogne-Franche-Comté	107	1.9%	3%	-0.1
Brittany	152	2.9%	4%	0.1
Centre Val de Loire	99	2.6%	2%	-0.1
Corsica	14	6.0%	0%	0.0
Île de France	1,152	-0.2%	27%	-5.3
Occitanie	334	3.1%	8%	-0.8
Hauts de France	210	3.2%	5%	-0.4
Normandy	125	5.2%	3%	+0.2
Pays de la Loire	196	0.2%	5%	0.0
Provence-Alpes-Côte d'Azur	324	2.9%	8%	-0.2
Overseas Territories	43	-11.6%	1%	0.1

Table 5: Breakdown of the .FR TLD by holder region in 2025

(\*) Chg.: change in percentage points of market share in each region over a long period (2015-2025)

The weights of the different regions correspond to the existence of big urban and economic centres: Auvergne Rhône-Alpes in 2nd position with 12%, Provence

Alpes Côte d'Azur and Occitanie in 3rd with 8% each, Nouvelle-Aquitaine in 5th with 7%, etc. The rural regions are further behind, even though some of them are also the strongest in terms of growth.

Since the figures do not vary greatly from one year to another, an analysis of the long-term trend reveals more insights. Between 2015 and 2025, the region losing most 'weight' was Île de France (-5.3 pp), although it remains by far the leader in terms of market share. Auvergne Rhône Alpes, Nouvelle-Aquitaine, Normandy, Brittany and the Overseas Territories have gained market share, despite these gains being limited.

Part of the growth of the .FR TLD was also obtained thanks to holders located abroad.

# 8. Foreign holders

The .FR TLD was opened to the rest of the EU in 2011, with a limited impact on growth momentum. The percentage of .FR domain names registered by foreigners (in stock) has nonetheless increased continuously ever since, rising from 4.9% in 2013 to 11.9% in 2025. 2018 has been the only negative year.

In terms of create operations, the share of names registered by holders abroad stood at 15.7% in 2025, compared with 14.9% in 2024 and 13.9% in 2023. A steady rise.

The growth (in stock) in the number of names registered by foreigners in 2025 was greater than that of the .FR TLD as a whole: 7.7% compared with 2.4%.

These data demonstrate the appeal of the .FR TLD to foreign businesses in particular wishing to sell their products and services on the French market.

## Percentage of .FR domain names registered by foreign holders



Figure 14: Percentage of .FR domain names registered by foreign holders (2015–2025)

(Key figures table for Figure 14)

Foreign holders are still primarily located in the Netherlands, in first place since 2022 (163,000 names as against 156,000 in 2024), Germany (stable at 85,000 names), Switzerland (62,000 names as against 53,000), Belgium (43,000 names as against 42,000) and Spain (27,000 names as against 23,000). The strong growth observed in the Netherlands over the past several years could be the consequence of sustained domaining activities among this country's players, through specialist registrars.

# 9. DNSSEC

The proportion of .FR DNSSEC-signed domain names increased from 3.8% in 2013 to 21.6% in 2025, a ninefold increase in volume from 103,000 to 932,000 names.

This is due to an active policy on the part of certain major registrars that have adopted procedures aimed, for example, at signing new names registered with DNSSEC.

## Percentage of DNSSEC-signed .FR names

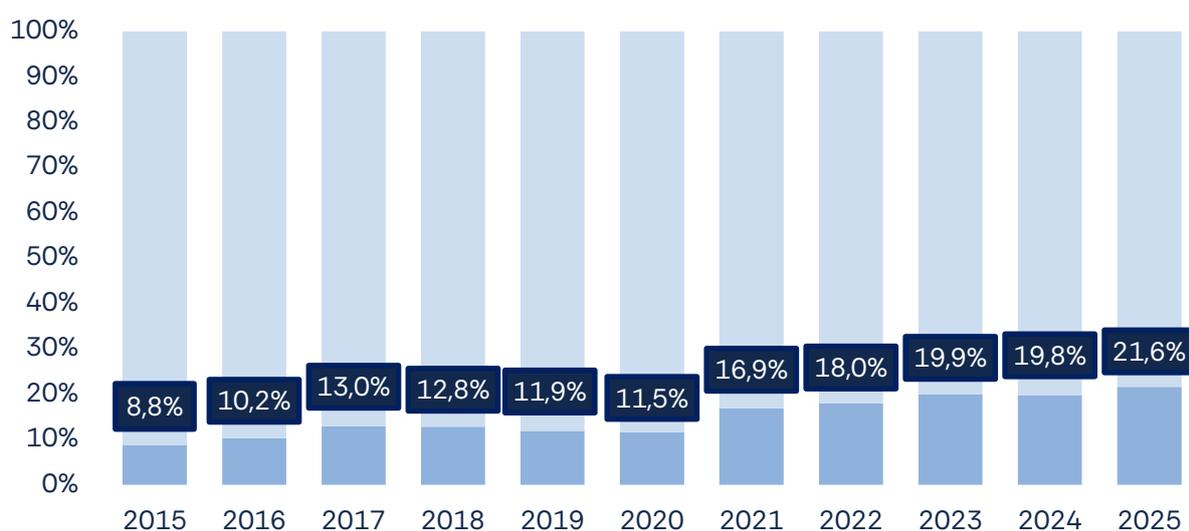


Figure 15: Percentage of DNSSEC-signed .FR domain names (2015–2025)

(Key figures table for Figure 15)

An initial surge was observed in 2021 followed by a second in 2023, with growth plateauing in 2024 and accelerating again in 2025.

Although this change is encouraging, this rate still remains fairly modest in view of those of other European TLDs.

The appearance in 2020 of a new type of attack dubbed SAD, which poisons the DNS cache by making it accept false responses which it then distributes to its clients, added further weight and currency to DNSSEC, which is the only reliable solution to these attacks. The more sustained development observed since 2021 can no doubt be attributed to this.

# 10. Internationalised domain names

The proportion of .FR names in the IDN (Internationalised Domain Name) format, i.e. containing special characters (accents, etc.), remains low at 0.8%.

The trend was very slightly upward between 2019 and 2023 following a period of decline in 2013–2018, In 2024, it posted a slight decline, with a symbolic increase in 2025.

This should be seen in the context of the increase in the total number of names in stock: the number of IDNs under .FR grew by 3.0% in 2025 to 32,584, i.e. more than the 2.4% of stock.

These figures are anecdotal at the level of the .FR TLD, no doubt including a large number of defensive names (brands containing accented characters) and some speculative names (common names containing accented characters). The lack of convincing use explains the low percentage and the sometimes virtuous, sometimes vicious circle that closely links the flows of domain names and the use made thereof.

## Percentage of .FR domain names registered in IDN format

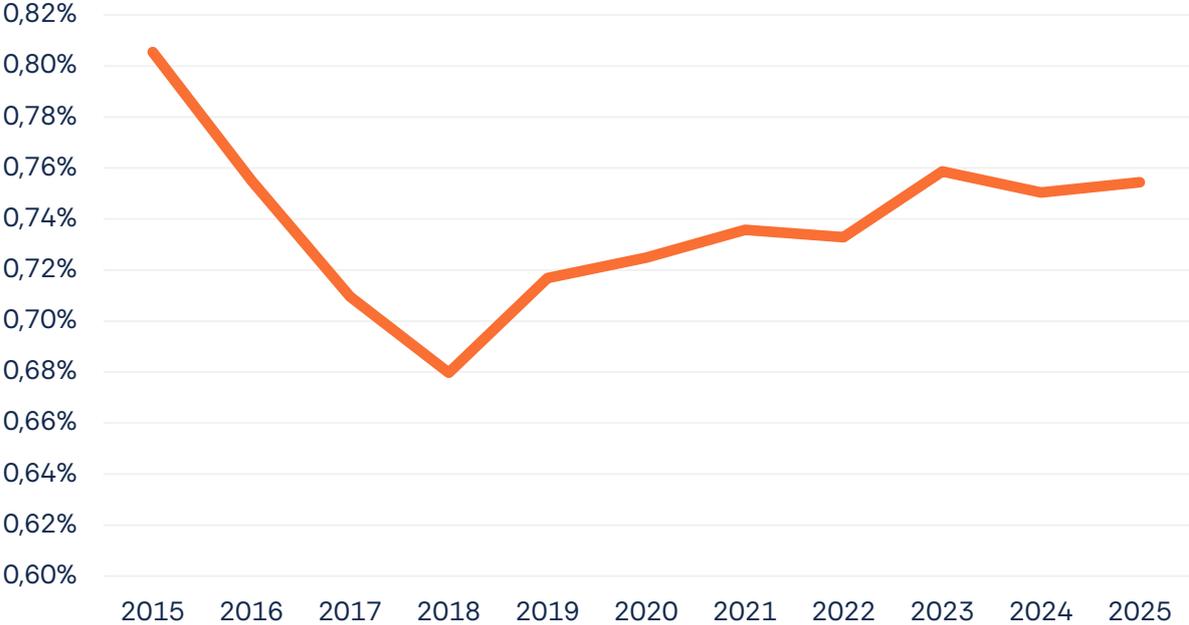


Figure 16: Percentage of .FR domain names registered in IDN format (2015–2025)

(Key figures table for Figure 16)

# 11. Multi-year registrations

The registration and renewal of .FR domain names for periods of over 1 year (and up to 10 years) has been possible since 30 March 2015. Yet although this possibility has existed for nearly ten years, the proportion (in stock) of .FR domain names registered or renewed for periods greater than one year remains marginal.

Multi-year registrations have increased notably since 2023, exceeding 7% initially (2023) and subsequently reaching 9% (2024), with 11% in sight for 2025.

At 1 January 2026, 463,521 .FR domain names had been registered for two years or more, representing an increase of 22% and of 1.7 pp of the total number of .FR names.

## Percentage of multi-year .FR domain name registrations

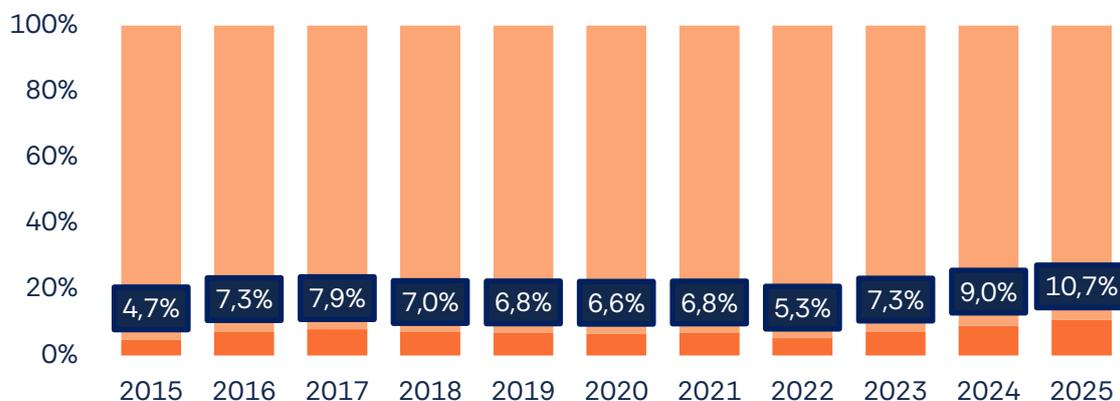


Figure 17: Percentage of multi-year .FR domain name registrations (2015–2025)

(Key figures table for Figure 17)

In stock (Figure 18) the maturity structure (from 2 to 10 years) at year-end 2025 shows that the bulk of the multi-year registrations expire in 2 years (57% as against with 62% at year-end 2024 and 68% at year-end 2023), with the other maturities declining. The proportion of multi-year names expiring in 3 years, meanwhile, increased from 16% in 2023 to 29% at the end of 2025. Other maturities are often negligible, but stable. In total, they represented 15% of multi-year registrations at the end of 2024 and 14% at the end of 2025.

## Stock of .FR multi-year registrations broken down by maturity



Figure 18: Stock of .FR multi-year registrations broken down by maturity

(Key figures table for Figure 18)

If we focus solely on create operations, we can see (Figure 19) that the share of multi-year names created quite literally skyrocketed, from 3% in 2023 to 14% in 2025. Which naturally explains the substantial variation in stock observed above.

## Proportion of multi-year .FR creations

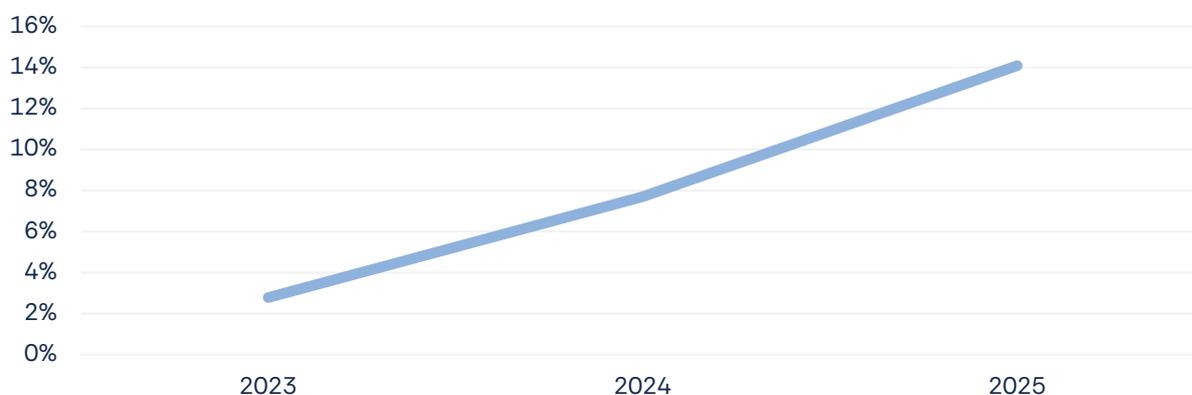


Figure 19: Percentage of multi-year .FR creations

(Key figures table for Figure 19)

Figure 20 highlights the fact that the preferred maturity is 3 years.

The other expiry maturities (2 years, 4 years and more) are developing at a symbolic rate.

This preference for the 3-year timeline owes nothing to chance: it corresponds to the maturity spotlighted in the multi-year packages of some of the major registrars since late 2024.

## Share of multi-year .FR creations by maturity

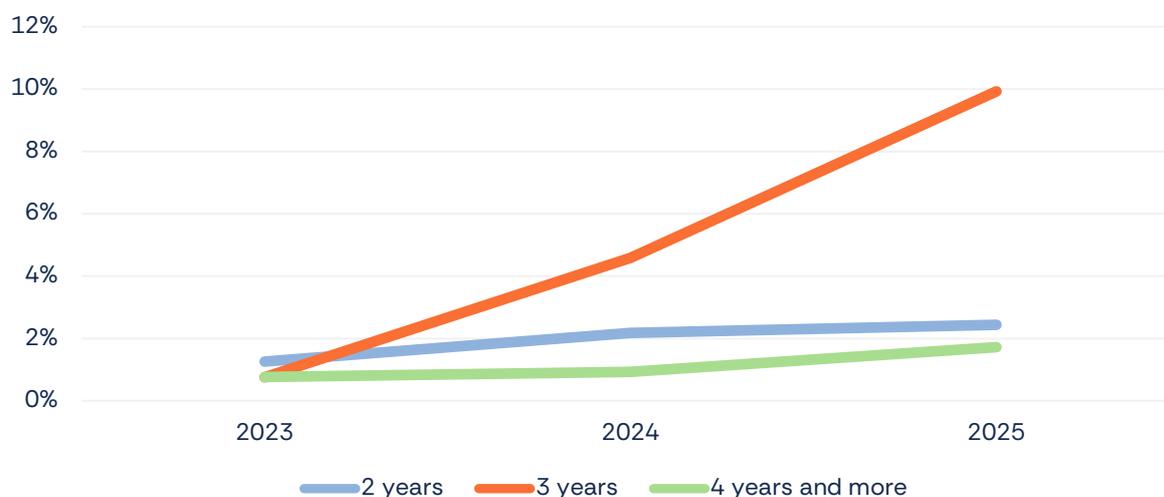


Figure 20: Share of multi-year creations by maturity (2023–2025)

(Key figures table for Figure 20)

2024 and 2025 thus represented a period of innovation in registrars' commercial offers. The downward trend in the proportion of multi-year registrations seen in stock between 2017 and 2022 could, indeed, be explained by the implementation of automatic renewal systems by various large registrars, which made the multi-year option less attractive.

Without removing the possibility of opting for automatic renewals, the innovation consisted in presenting attractive offers from a financial point of view, subject to a 'commitment' from the customer over several years, equating to multi-year registrations.

The key question that will arise as of the end of 2027 is what the effective retention rate will be for the names registered under these offers. Will holders who registered them 3 years ago tend to use them more than names registered

for 1 year? Or will there be no effect from the retention rate standpoint, with the same proportion of abandoned names, simply on a postponed schedule?

# 12. The .FR and business creation

.FR create operations are carried out by:

- businesses that have existed for some time, in the context of their activity;
- newly created businesses;
- project promoters registering their domain names personally in the absence of a legal structure;
- private individuals with needs of a professional or private nature leading them to register a .FR name.

It is therefore not possible to expect a situation in which .FR create operations are entirely due to newly created businesses, especially since newly established businesses or those being created do not exclusively register .FR domain names.

Nevertheless, we thought it interesting to compare trends in .FR create operations and in business start-ups, on the basis of data provided by the French National Institute of Statistics and Economic Studies (INSEE).

Figure 21 hereunder shows that there is a link between the dynamics of the .FR TLD and business creation, particularly the creation of individual enterprises or sole proprietorships rather than of businesses with the legal form of a company.

## Change in .FR create operations and business startups

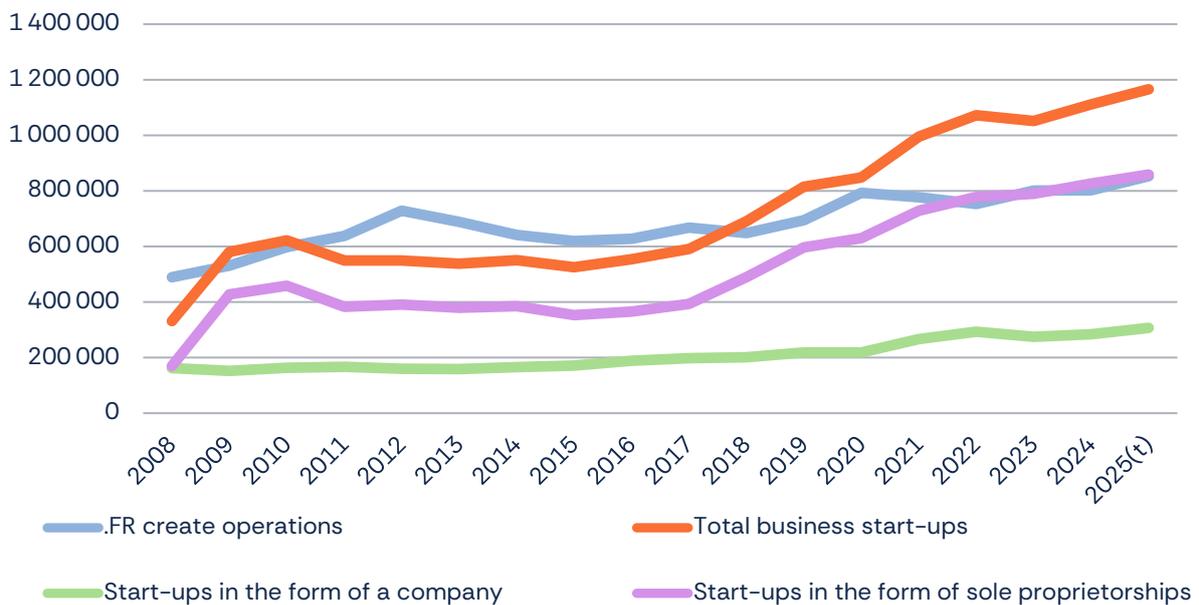


Figure 21: .FR create operations and business start-ups

(Key figures table for Figure 21)

This link is particularly visible over the period 2013–2017, when the annual figures were fairly stable, and in 2019–2020 when both kinds of creation increased. The .FR domain seems to have benefited somewhat less from business startups in 2021 and 2022, perhaps because the newly created businesses in these years adopted an Internet presence less promptly than in 2020.

**In 2025, the trend in .FR operations was aligned with that of creations of the different types of companies identified by INSEE.**

In view of the large number of parameters involved, it is difficult to offer any definitive explanations for these variations. The trend observed in 2020–2021 suggests, however, that newly created businesses tended, more than in previous years, to adopt a digital presence, something that was relatively less prominent in 2022–2025.

In spite of this, the strong business creation dynamic remains without doubt one of the main factors behind the volume of .FR create operations in 2023–2025, with the .COM price hike emphasising the preference for .FR.

The trend in business failures also warrants study since it constitutes a factor that may influence the level of .FR delete operations.

The visible dip in 2020/2021 is likely attributable to the government aid which protected businesses from failure linked to the health crisis, while at the same time allowing some that would normally have gone bankrupt to survive.

The volume of businesses concerned can be estimated at around 20,000 in both 2020 and 2021. A ‘pool’ of fragile businesses was thereby formed, likely to collapse once government aid was discontinued.

In 2022, the number of failures increased substantially (+50%) but was still around 4,000 fewer than the number that would have been expected if the pre-COVID trend had continued. In 2023–2024, this ‘catch-up effect’ was followed by a 38% increase in the number of business failures in 2023, 12% in 2024 and 1% in 2025 (projections based on INSEE data available at the end of August). It thus

once again exceeded by 27,000 the number of delete operations that should have taken place *ceteris paribus* since 2019.

### Total number of business failures in France

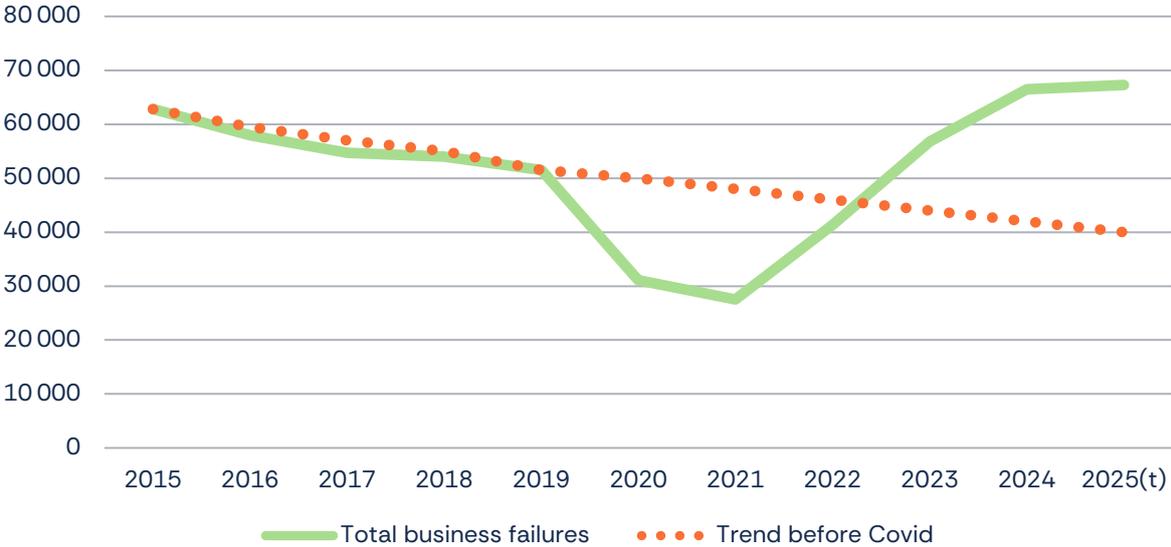


Figure 22: Total number of business failures

Source: INSEE. Last updated 17 October 2025, data to August 2025.

The figure for 2025 is a projection based on the historical weights of each month between 2015 and 2024.

(Key figures table for Figure 22)

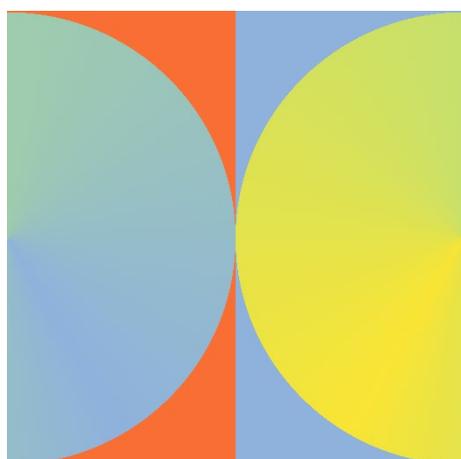
The pool of fragile businesses, which we estimate at around 40,000, has therefore not yet been drained (differences of 13,000 in 2023, 25,000 in 2024 and 27,000 in 2025, i.e. a total of 65,000). Of these 65,000, 25,000 are due to the current economic climate rather than a “return to normality”.

Does the stabilisation observed in 2025 signal a trend change or simply a ‘pause’ in the rate of business failures?

# 13. 2026 outlook for .FR

.FR create operations increased by 6.3% in 2025, reaching an exceptional level of 853,000 domain names.

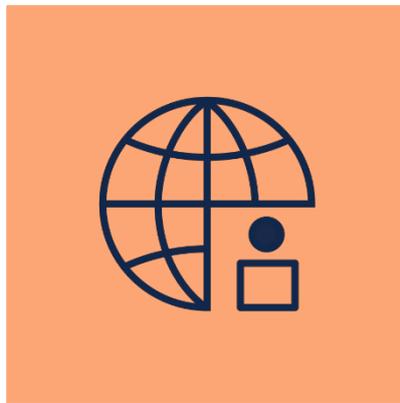
As explained above, these performances stem from the fact that the digital transformation is becoming more deeply embedded among VSEs/SMEs, but also from the marketing and commercial actions of registrars which have galvanised the market.



All else being equal, these two factors will have opposite effects on the retention rate. Create operations carried out to respond to 'real' needs will improve the retention rate, whereas 'opportunistic' names, registered as part of commercial operations not designed to become lastingly integrated into uses, will accentuate volatility and place downward pressure on the

retention rate. This is one of the reasons why Afnic ensures, through the commercial operations it puts in place with its registrars, that these are aimed at ensuring the long-term retention of names based on uses. The question remains whether this robust momentum can be maintained in 2026: our assumptions tend towards a return to the already high levels recorded in 2023 and 2024.

The trend towards increased deletions, consolidated by the high volume of create operations, should, in principle, be apparent in the change in the overall stock of .FR names. That said, it will be tempered by the growing proportion of multi-year names registered, at least up until 2027–2028. Consequently, it can be assumed that retention rate, which has declined in recent years, will stabilise and even improve slightly in 2026, holding at around the 82.5–83% mark.



Another major player in the French market, the .COM TLD represents a source of uncertainty for 2026. Between 2024 and 2025, it benefited from the positive impact of create operations driven by the promotional campaigns put in place by Verisign. But these creations will begin to expire as of early 2026. This year could therefore see the .COM momentum consolidated, but it could also lead to a collapse under the weight of deletions, at a time when Verisign is relying on fee increases to maintain its turnover and net margin.

The .FR TLD is thus at risk of being impacted by the stability of its closest competitor. If the retention rate is high among .COM names, market shares will likely remain stable or even shift to the detriment of the .FR TLD, given that Verisign has continued its promotional offers. If, on the other hand, there is a high level of deletions, the .COM TLD will lose ground to .FR, boosted by a rising retention rate.

Another factor not to be omitted with regard to 2026 is the second round scheduled to be opened by ICANN for the creation of new gTLDs, including dot brands. Although this even will likely not have an impact on the market in 2026, and only a limited impact in 2027 as new TLDs are created.

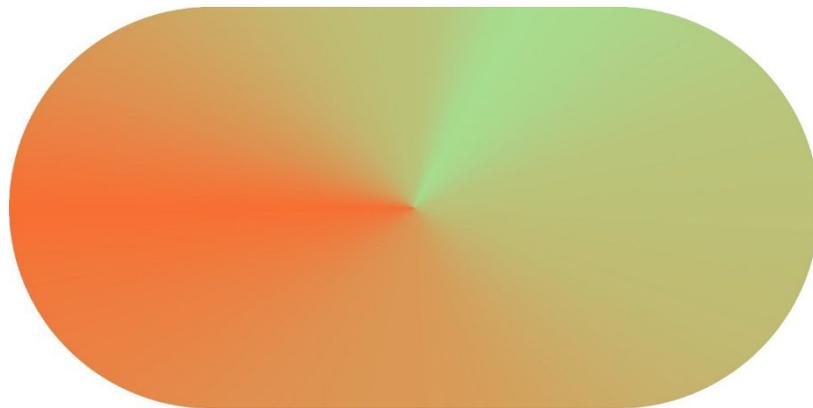
One of the factors that could have a negative impact on the domain name industry is the increasingly prevalent use of artificial intelligence-based tools, such as 'AI aggregators'. This poses a twofold challenge for domain names. Firstly, it means that users do not need to visit websites for information as AI provides the answers in pre-digested format (which could also have benefits). Secondly, this has the consequence of calling into question the role of content publishers (whether in terms of economic returns or otherwise), given the lower visitor numbers. If an equilibrium is not found, this situation could reduce the added value of websites in the long term and affect both create and renew operations (for all TLDs combined).

Lastly, there is the question of Google's policy changes, with the implementation of its new RSOC (Related Search for Content) system and the withdrawal of AdSense for Domains, which is fundamentally changing the domaining economy by placing greater value on traffic. Once again, this could have negative implications for the dynamics of the domain name market as a whole, even though ccTLDs will probably be less vulnerable to unpleasant surprises than some gTLDs resulting from domaining activities.

**Faced with these challenges and uncertainties, growth of the .FR domain in 2026 should be between 1% and 2%, increasingly aligned with that of the other European ccTLDs.**

Afnic's continued efforts aimed at VSEs and SMEs, including initiatives such as "Réussir avec le web" ["Succeed with the Web"] and the "Je passe au numérique" [I'm going digital], form part of the possible responses to the uncertainties by making .FR the go-to option in both good practices and uses.

More than ever, Afnic is a key player in the development of the Internet in France and a privileged partner for public authorities and private structures alike, first and foremost VSEs and SMEs.



# Annex: Source data for graphs

Figure 1: Change in annual growth rates (2011-2025)

	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024	2025
Growth .FR	3.2%	2.2%	5.2%	4.4%	3.7%	7.0%	5.8%	2.9%	3.4%	2.0%	2.4%
Growth French market	5.3%	2.6%	3.2%	2.1%	2.0%	6.1%	3.6%	1.3%	1.1%	1.6%	2.6%
Growth EU zone (excluding the UK)	3.0%	1.9%	2.9%	0.0%	0.7%	3.4%	2.9%	1.6%	1.6%	0.4%	0.7%
Growth global market	9.2%	10.6%	0.8%	4.0%	4.6%	-0.2%	0.5%	1.9%	1.8%	3.1%	5.0%

[\(Back to graph 1\)](#)

Figure 2: Change in market share in France (2013 – 2025)

	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024	2025
FR	35.7%	35.7%	36.4%	37.2%	37.7%	38.0%	38.8%	39.4%	40.3%	40.4%	40.4%
.COM	43.2%	43.3%	43.4%	44.6%	45.2%	44.5%	45.1%	44.5%	43.8%	43.5%	44.1%
Other Legacy TLDs	14.9%	14.0%	13.0%	12.1%	11.3%	11.0%	10.7%	10.4%	10.1%	9.9%	10.2%
Other ccTLDs	4.2%	4.1%	4.0%	3.7%	3.5%	3.3%	3.1%	3.0%	3.0%	2.9%	3.0%
nTLDs	2.1%	3.0%	3.3%	2.4%	2.3%	3.3%	2.4%	2.7%	2.8%	3.2%	2.4%

[\(Back to graph 2\)](#)

Figure 3: Change in .FR activity (2015 – 2025)

	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024	2025
Create operations	614,259	627,626	667,948	648,563	694,063	793,441	776,514	753,412	801,427	802,202	852,936
Delete operations	523,261	562,471	511,386	509,602	570,408	551,994	564,245	639,367	683,867	719,090	750,392
Net balance	90,998	65,155	156,562	138,961	123,655	241,447	212,269	114,045	117,560	83,112	102,544
Renew operations	2,330,126	2,381,914	2,498,141	2,656,503	2,734,888	2,876,957	3,106,127	3,243,035	3,332,395	3,414,530	3,466,394

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Figure 4: Structure of the .FR net balance (2015 – 2025)

	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024	2025
Net balance	90,998	65,155	156,56 2	138,97 7	123,88 5	241,44 7	212,26 9	114,04 5	137,58 7	83112	10254 4
Change in renew operations	118,04 3	51,788	116,22 7	158,36 2	78,385	142,06 9	229,17 0	136,90 8	89,360	82135	51864
Change in create operations	- 27,045	13,367	- 40,322	- 19,385	45,500	99,378	- 16,927	- 23,102	48,015	775	50734

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Figure 5: Change in the .FR creation rate (2015–2025)

	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024	2025
Creation Rate	20.9%	20.9%	21.1%	19.6%	20.2%	21.6%	20.0%	18.9%	19.4%	19%	19.8%

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Figure 7: Change in Retention Rate

	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024	2025
Retention Rate	81.7%	80.9%	83.0%	83.9%	82.7%	83.9%	84.6%	83.5%	83.4%	82.6%	82.2%

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Figure 8: Structure of .FR names by age at 31 December 2025

	10 years+	9 years	8 years	7 years	6 years	5 years	4 years	3 years	2 years	1 year	0 years
31/12/2025	25%	3%	4%	4%	5%	6%	7%	7%	9%	12%	19%

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Figure 9: Retention rate by age of .FR names in 2025

	10 years+	9 years	8 years	7 years	6 years	5 years	4 years	3 years	2 years	1 year
2025 Retention Rate	92%	90%	89%	88%	87%	85%	85%	81%	78%	66%

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Figure 11: Concentration rate (HHI) of the top 10 registrars (2015 – 2025)

	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024	2025
<b>HHI - stocks</b>	11.3 9	12.2 7	13.4 7	14.9 3	15.1 1	15.6 3	16.0 2	16.9 9	18.1 9	18.9 2	19.1 3	19.0 0	18.3 0	18.0 5	17.5 7	17.4 5
<b>HHI - Create operations</b>		16.2 7	17.8 4	19.8 4	17.9 1	18.4 18.4	17.1 5	17.9 17.9	17.5 8	18.0 7	17.3 8	16.0 1	13.5 7	13.9 4	12.2 4	12.6 6

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Figure 12: Percentage of domain names transferred between registrars (2015–2025)

	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024	2025	2026
Number of .FR at 1 January	2,853, 206	2,944, 403	3,009, 527	3,166, 105	3,305, 296	3,428, 951	3,670, 372	3,882, 488	3996 245	4133 832	4,216, 786	4,319, 120
Number of .FR names transferred from one registrar to another	57,77 6	68,20 1	65,99 6	71,64 8	77,38 9	113,6 75	84,16 7	73,42 1	90,34 7	9909 4	102,9 92	
%	2.0%	2.3%	2.2%	2.3%	2.3%	3.3%	2.3%	1.9%	2.3%	2.4%	2.4%	

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Figure 13: Market shares of the three leading registrars in stock and in create operations (2015–2025)

	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024	2025	
Stock	60.00%	60.80%	63.90%	64.80%	65.3%	64.9%	64.3%	62.9%	61.8%	60.2%	58.7%	-6.6%
Create operations	62.40%	61.50%	62.90%	62.50%	63.3%	59.3%	56.6%	52.7%	52.3%	47.5%	47.2%	-16.1%

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Figure 14: Percentage of .FR domain names registered by foreign holders (2015–2025)

	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024	2025
%	6.8%	7.5%	8.6%	8.3%	8.4%	8.7%	9.2%	9.7%	10.9%	11.3%	11.9%
% French	93%	92%	91%	92%	92%	91%	91%	90%	89%	89%	88%
Number of domain names registered by foreigners	199,4 80	226,7 38	270,7 58	272,8 61	286,6 56	318,7 98	355,2 56	388,9 14	449,4 96	47711 1	51384 6
Number of .FR	2,944, 403	3,009, 527	3,166, 105	3,305, 296	3,428, 951	3,670, 372	3,882, 488	3,996, 245	4,133, 832	42167 86	43191 20
Of which EU (excluding the UK 2021- )	191,8 86	219,5 58	263,3 94	265,5 23	278,4 96	310,6 56	323,8 03	362,4 89	429,4 71	46057 3	49919 6
% EU / Foreigners	96.2%	96.8%	97.3%	97.3%	97.2%	97.4%	91.1%	93.2%	95.5%	96.5%	97.1%
Change in no. of domain names registered by foreigners	23.4%	13.7%	19.4%	0.8%	5.1%	11.2%	11.4%	9.5%	15.6%	6.1%	7.7%

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Figure 15: Percentage of DNSSEC-signed .FR domain names

	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024	2025
%	9%	10%	13%	12.8%	11.9%	11.5%	16.9%	18.0%	19.9%	19.8%	21.6%
% non-DNSSEC	91%	90%	87%	87%	88%	88%	83%	82%	80%	80%	78%
Number of DNSSEC-signed domain names	258,321	308,459	410,651	423,625	408,871	422,621	656,054	718,232	823,867	835,254	931,996
Number of .FR	2,944,403	3,009,527	3,166,105	3,305,296	3,428,951	3,670,371	3,882,488	3,996,245	4,133,832	4,216,786	4,319,120

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Figure 16: Percentage of .FR domain names registered in IDN format

	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024	2025
%	0.8%	0.8%	0.7%	0.7%	0.7%	0.7%	0.7%	0.7%	0.8%	0.8%	0.8%
Number of domain names with IDN characters	23,717	22,724	22,467	22,467	24,580	26,605	28,568	29,286	31,364	31,646	32,584
Number of .FR	2,944,403	3,009,527	3,166,105	3,305,296	3,428,951	3,670,371	3,882,488	3,996,245	4,133,832	4,216,86	4,319,120
Variation	-4.7%	-4.2%	-1.1%	0.0%	9.4%	8.2%	7.4%	2.5%	7.1%	0.9%	3.0%

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Figure 17: Percentage of .FR domain names registered in multi-year form

	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024	2025
%	4.7%	7.3%	7.9%	7.0%	6.8%	6.6%	6.8%	5.3%	7.3%	9.0%	10.7%
% not M-Y	95%	93%	92%	93%	93%	93%	93%	95%	93%	91%	89%
Number of name domain names registered for more than one year	139,278	220,137	251,225	232,967	233,929	242,761	263,722	211,906	299,848	381,514	463,521
Number of .FR	2,944,403	3,009,527	3,166,105	3,305,296	3,428,951	3,672,371	3,882,488	3,996,245	4,133,832	4,216,786	4,319,120
Variation	-	58.1%	14.1%	-7.3%	0.4%	3.8%	8.6%	19.6%	41.5%	27.2%	21.5%

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Figure 18: Stock of .FR multi-year registrations broken down by maturity

	2 years	3 years	4 years	5 years	6 years	7 years	8 years	9 years	10 years
1 January 2025	212,978	78,301	18,969	14,242	5,064	3,067	4,682	3,364	2,381
1 January 2025	62%	23%	6%	4%	1%	1%	1%	1%	1%
1 January 2026	265,806	134,274	22,300	18,705	5,584	5,569	3,462	4,113	3,708
1 January 2026	57%	29%	5%	4%	1%	1%	1%	1%	1%

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Figure 19: Percentage of multi-year .FR creations

	2023	2024	2025
FR	3%	8%	14%

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Figure 20: Share of multi creations by maturity

	2023	2024	2025
2 years	1%	2%	2%
3 years	1%	5%	10%
4 years+	1%	1%	2%

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Figure 21: .FR create operations and business start-ups

	2008	2009	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024	2025
.FR create operations	489,374	531,449	597,725	638,095	728,807	688,302	641,346	619,659	627,626	667,948	648,563	694,063	793,441	776,514	753,412	801,427	802,202	852,936
Total business start-ups	331,439	580,193	622,039	549,805	549,975	538,185	550,794	525,091	554,031	591,267	691,283	815,257	848,164	995,519	1,071	1,065	112,1	116,4
Start-ups in the form of a company	161,808	152,303	163,659	166,674	159,529	158,875	165,764	171,998	188,843	197,899	201,087	218,426	218,054	267,075	293,384	274,957	289,132	306,962
Start-ups in the form of sole proprietorships	169,631	427,890	458,380	383,131	390,446	379,310	385,030	353,093	365,188	393,368	490,196	596,831	630,110	728,444	778,497	789,768	837,248	858,732

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Figure 22: Total number of business failures (source INSEE)

	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024	2025
Total number of business failures	62,80 6	57,95 9	54,68 7	54,01 2	51,50 2	31,06 8	27,52 6	41,31 6	53,17 9	63614	6728 2
Pre-COVID trend	62,80 6	59,50 0	57,00 0	55,00 0	51,50 0	50,00 0	48,00 0	46,00 0	42,00 0	40000	4000 0
Difference / Pre-COVID trend	0	- 1,541	- 2,313	-988	2	- 18,93 2	- 20,47 4	- 4,684	11,17 9	23614	2728 2
Chg. failures	-	-8%	-6%	-1%	-5%	-40%	-11%	50%	29%	12%	1%

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# ● INFORMATION

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### ABOUT AFNIC

Afnic is the registry operator for .fr (France), .re (Réunion), .yt (Mayotte), .wf (Wallis and Futuna), .tf (French Southern and Antarctic Lands), and .pm (Saint Pierre and Miquelon) domain names and a provider of back-end and registry solutions and services. Afnic – *Association Française pour le Nommage Internet en Coopération*, the French Network Information Centre – is composed of public and private actors: representatives of the public authorities, Internet users and service providers (registrars). It is a non-profit association.