# CAMEROON
# DATA CENTER MARKET BRIEFING

A strategic overview of the data center investment opportunity in Cameroon

A Xalam Analytics Country Report

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DATA
GOVERNANCE
IN AFRICA

This report is part of a series of market briefs developed by Xalam Analytics at the behest of Digital Investment Facility (DIF) under the Data Governance in Africa Initiative, on the data center market opportunity in sub-Saharan Africa (“SSA”). This analysis aims to provide key insights into market demand and supply patterns for data center markets, business landscape, regulatory impact and investment returns. The research aims to provide potential investors and stakeholders with the latest information on the data center market in the SSA region.

This country review is based on our assessment of information and data as available to our research. It is further underpinned by our understanding of the marketplace along with market data and insights collected through continuous research. The numbers and estimates in this report are derived from a mix of sources, including estimates from Xalam Analytics’ economic models, data providers, regulator data and other sources as may be indicated.

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# The Cameroon data center investment case

## Considerable underlying potential remains hampered by critical market constraints

### THE OPPORTUNITY

- **The  largest economy in the Central Africa region** and a top 10 economy in sub-Saharan Africa.
- The government of Cameroon **aims to build the country into Central Africa's digital hub**. The market has solid digital infrastructure foundations. Cameroon is connected to four submarine cables offering direct routes to Europe, South Africa and the Americas.
- **The terrestrial fiber backbone reach is one of the most extensive in Central Africa**; 4G network coverage extends to more than 90% of the population.
- **Favorable power generation conditions**; ~60%+ from renewables, primarily hydro.

### CHALLENGES & RISKS

- **Broadband penetration remains relatively low**. At ~55%, it is around the African median, likely due to the concentrated nature of the market, and Camtel's monopoly on wholesale fiber.
- **Some oversupply and demand size risk**, with small enterprise base, slow enterprise digital transformation, limited international player deployments.
- Relatively high cost of power.
- **Concentrated wholesale fiber market**; state-owned Camtel holds a monopoly in terrestrial and international capacity, creating a substantial bottleneck.

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# Cameroon data center market overview

*Estimates as of 2025*

| | |
|---|---|
| **~5-7** | Live DC facilities |
| **4.0MW** | Live critical IT load (1) |
| **NA** | Capacity in construction (2) |
| **NA** | Long term pipeline (3) |
| **NA** | Facilities in construction or in pipeline |
| **~60%** | Facility occupancy (4) |
| **$13m** | Annual Commercial Data Center Revenue |
| **7%** | Data center market CAGR (2025-30) |

(1)Capacity that is active, under lease or readily available for lease by third-party customers.
(2)IT load capacity from facilities currently in construction; construction has broken ground; ongoing civil works, installation and commissioning phases are in progress.
(3)Facilities explicitly announced or listed as in development. Some execution phases have been initiated (e.g. land control, energy supply commitments, etc.), but no actual civil works have been undertaken. Capacity expected to be available by the end of 2030.
(4) Percent of available capacity that is effectively being used by third party customers.
Sources: Xalam Analytics estimates, provider data

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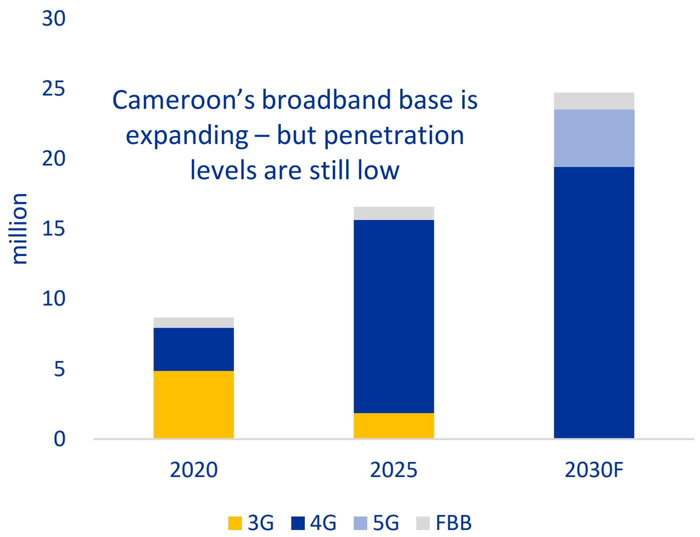
# Key drivers of demand for data centers

A potentially sizable market with extensive fiber assets, but Internet adoption has lagged peer markets

**A growing digital customer base**
Cameroon broadband connections by type - million

| *BB penetration* | 35% | 60% | 80% |
|---|---|---|---|

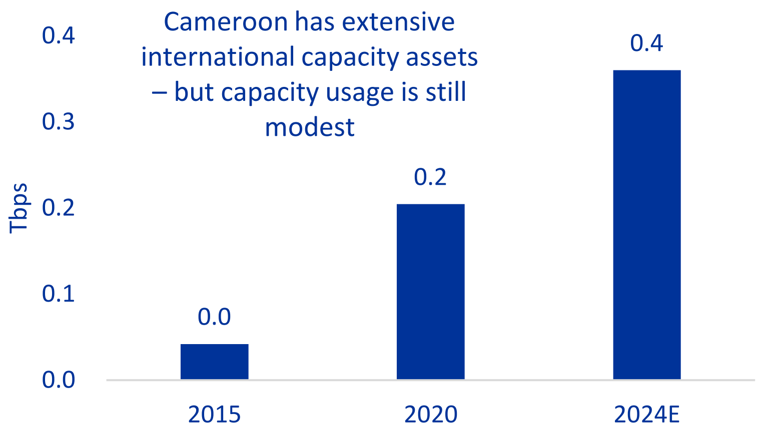



**A fast-growing economy, with moderate inflation**
Sample Cameroon economic indicators - 2025

| | |
|---|---|
| **~$60bn**<br>GDP | **3.8%**<br>Real GDP growth |
| **60%**<br>Broadband penetration | **3.7%**<br>Annual inflation |

**Accelerated digital infrastructure build**
Cameroon international capacity usage - Tbps

| Submarine cables | 3 | 4 | 4 |
|---|---|---|---|




Sources: INS, IMF, ART and provider data, Xalam Analytics estimates

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# Data center market conditions

Cameroon's Technology New Deal has set the foundation for a more favorable operating environment for digital infrastructure

## Data privacy, hosting & investment incentives

- 2010 cybersecurity law provides the core framework for data protection in Cameroon.
- Sets the broad framework for personal data processing and transfer – but no explicit localization requirements.
- Central bank (BEAC) requires localization of financial services data.

## Electricity Markets

- Cameroon has a generation capacity of ~1.6GW; power is sourced from utility ENEO and a handful of off-grid IPPs; ~25% of power generation comes from IPPs.
- ~60% of power generation from hydro sources; less than 3% sourced from other renewables.
- Relatively high electricity prices - $0.16/kWh.
- Prices set to increase by 5%-10% a year for business customers, as the utility seeks to align prices with operating costs.

## Fiber markets

- Four submarine cables – one of the largest pools of international capacity in Sub-Saharan Africa.
- Good fiber route diversity – terrestrial, regional, to Europe and to the Americas; Cameroon is a connectivity hub for landlocked countries in the Central Africa sub-region.
- Cameroon fiber is a monopoly market; state-owned Camtel holds a monopoly in terrestrial and international capacity, creating a substantial bottleneck.
- The market has been relatively unattractive to regional, international connectivity providers.

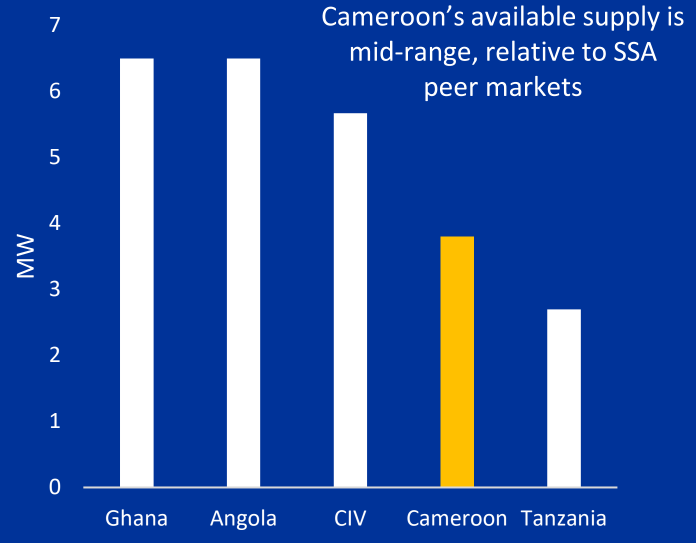
# State of data center supply

Cameroon's commercial data center capacity growth has been relatively flat

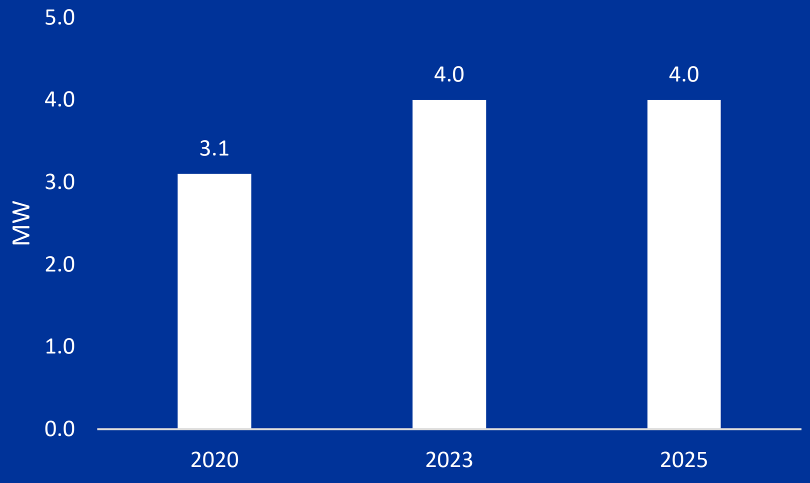
**Cameroon data center supply – 2025E**
Sample market indicators (1)

| | |
|---|---|
| **~5-7** Live commercial DC facilities | **~4MW** Live IT load |
| **4MW** Potential/Full-build IT load (2) | **~10%** % of supply that is carrier-neutral |

**Cameroon vs. SSA peers**
Critical IT load – MW




**Cameroon data center – evolution of live supply**
Critical IT load - in MW




(1)Numbers are rounded up (2) Potential/Full-build load is facility capacity assuming that all phases of development have been completed. Additional CapEx would be needed to make the residual capacity operational.
Sources: Xalam Analytics estimates, provider data

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# Key data center market players

Telcos and state-owned entities have a sizable presence in the data center market

### The Telcos

orange MTN

Focused on mobility and connectivity - see colocation as an adjacent opportunity.

### The infraco

camtel

State-owned integrated telco

### The Carrier-neutral

ST DIGITAL

IT/B2B provider offering services on a carrier-neutral basis

## A telco market

- Cameroon is a historically telco-dominated data center colocation market. Telco and fiber infraco facilities still accounted for ~90% of overall capacity in 2025.
- The weight of government facilities is notable; nearly half of the capacity is directly or indirectly state-owned.
- There is limited carrier-neutral presence, outside of independent provider ST Digital (which also offers cloud services).

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# GLOSSARY & KEY DEFINITIONS

# Key definitions

| | |
|---|---|
| Data center | While there are a variety of definitions for data centers, this market review is focused on commercial facilities , that is, facilities that lease colocation white space  and power capacity to third-party customers on open, commercial terms, and in exchange for a fee. Captive facilities (bank data centers, telco switch sites and similar) are excluded from this assessment. Estimates focus on facilities at Tier II standard and above, unless otherwise indicated. Where applicable, these estimates include cloud hyperscaler self-built facilities. |
| Live critical IT load | Capacity that is active, under lease or readily available for lease. |
| Full build capacity | Data center facilities are typically built in phases; the full-build capacity is capacity assuming all potential phases of build have been completed and are live. |
| Capacity in construction | Facilities that have broken ground; ongoing civil works, installation and commissioning phases. |
| Pipeline | Facilities explicitly announced or listed as in development. Some execution phases have been initiated (e.g. land acquisition, power supply commitments, etc.), but no actual civil works have been undertaken. |
| Carrier-neutral | Facilities not specifically affiliated to a connectivity or cloud vendor, with capacity available to all third-party customers, on equal commercial terms, without explicit or implicit constraints or favoritism. This market review uses a loose definition for carrier-neutral, referring to facilities that are purely carrier-neutral, recognized by the market or effectively managed as such. |

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# Glossary

Below are some of the key abbreviations used in this report

| | |
|---|---|
| **AI** | Artificial Intelligence |
| **ASN** | Autonomous System Number |
| **bn** | billion |
| **CAGR** | Compound Annual Growth Rate |
| **CapEx** | Capital Expenditures |
| **CDN** | Content Delivery Network |
| **Colo** | Colocation |
| **DC** | Data Center |
| **DIF** | Digital Investment Facility |
| **EAC** | East African Community |
| **EU** | European Union |
| **F** | Forecast |
| **FBB** | Fixed Broadband |
| **FDI** | Foreign Direct Investment |
| **FX** | Foreign Exchange |
| **GDP** | Gross Domestic Product |
| **GDPR** | General Data Protection Regulation |
| **ICT** | Information, Communications and Technology |
| **ISP** | Internet Service Provider |
| **IPP** | Independent Power Producer |
| **IT** | Information Technology |

| | |
|---|---|
| **kW** | Kilowatt |
| **kWh** | Kilowatt Hour |
| **LLM** | Large Language Models |
| **m** | million |
| **MNC** | Multinational Corporation |
| **MNO** | Mobile Network Operator |
| **MRR** | Monthly Recurring Revenue |
| **MSP** | Managed Service Provider |
| **MW** | Megawatts |
| **NDC** | National Data Center |
| **OEM** | Original Equipment Manufacturer |
| **POP** | Point of Presence |
| **PUE** | Power Usage Effectiveness |
| **RFS** | Ready For Service |
| **SEZ** | Special Economic Zone |
| **SSA** | Sub-Saharan Africa |
| **USD** | US dollar |
| **PUE** | Power Usage Effectiveness |
| **RFS** | Ready For Service |
| **SSA** | Sub-Saharan Africa |
| **YE** | Year end |

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