

Sound check script

Please read out loud

Hello, my name is - - - and I will be speaking during the session today. I am testing my audio to confirm that the technical service providers can hear me clearly.



85 | COMMUNITY
FORUM



ccNSO Members Meeting

ccTLD Market Session: Trends (1 of 2)

10 March 2026



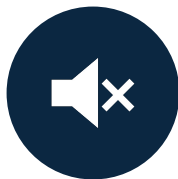
**SPEAK SLOWLY AND
CLEARLY.**



**USE A HEADSET FOR
BETTER AUDIO AND
INTERPRETATION.**



**RAISE YOUR HAND IN
ZOOM TO JOIN THE
QUEUE.**



**ON SITE? PLEASE
MUTE YOUR ZOOM
AUDIO.**



**REMOTE? PLEASE
TURN ON YOUR
CAMERA WHEN
SPEAKING.**



**NON-ENGLISH
SPEAKER? LET US
KNOW FOR
INTERPRETATION.**

Have a headset ready!



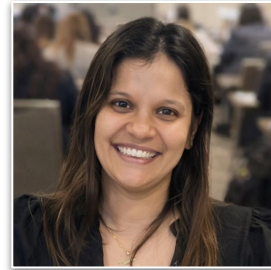
Participants could present, ask questions, or contribute in languages other than English.

ccTLD Market Session: Trends (1 of 2)

Tuesday, 10 March 2026 | 15:00-16:00 local (09:30-10:30 UTC)

Session chair: Namrata Gilada, NetKnowledge

- Barrack Otieno
- Patrick Myles



AfTLD

Growth Trends in African ccTLDs

Secretariat@aftld.org

<http://www.aftld.org>

Africa Top Level Domains
Organization



Current State of African ccTLDs - Key Metrics

Total Domain Names

4.33M

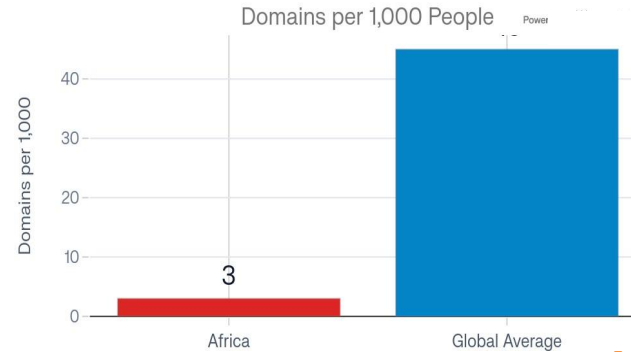
Growth Since 2016

203%

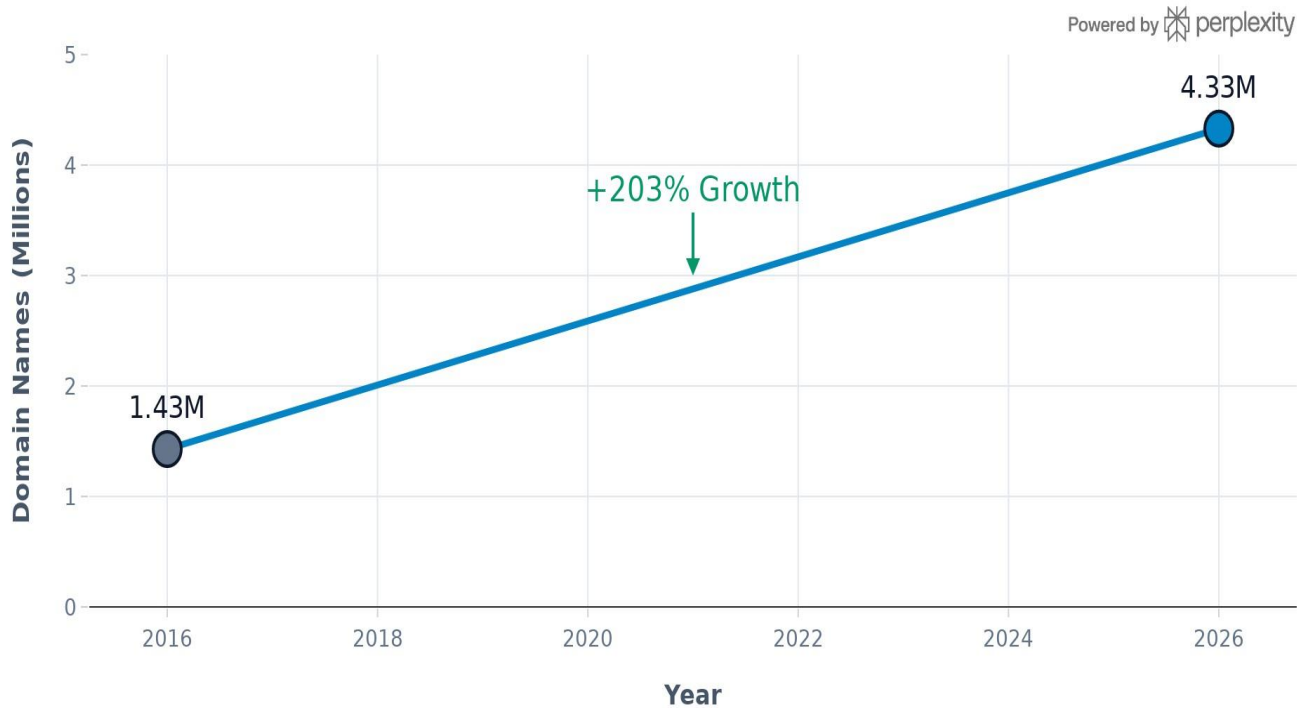
Industry Value

Industry Value (USD)

\$137M



African ccTLD Domain Growth (2016-2026)

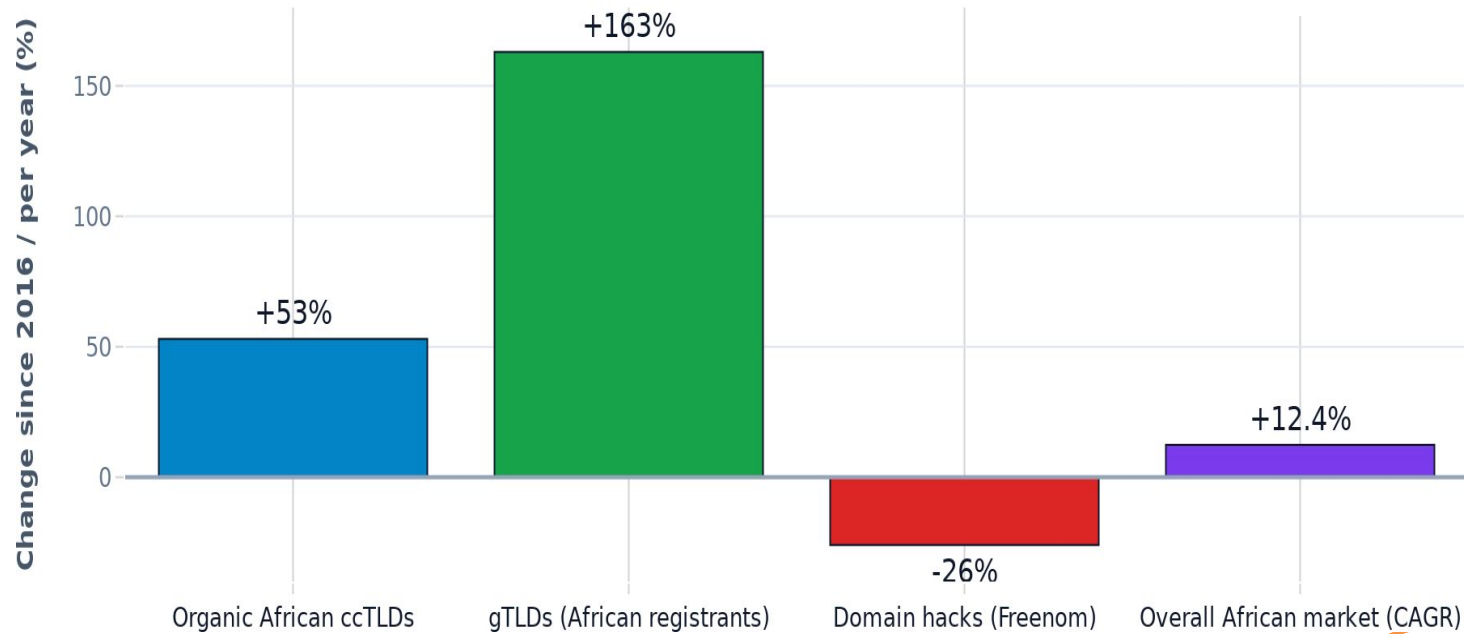


African ccTLDs: Key Statistics

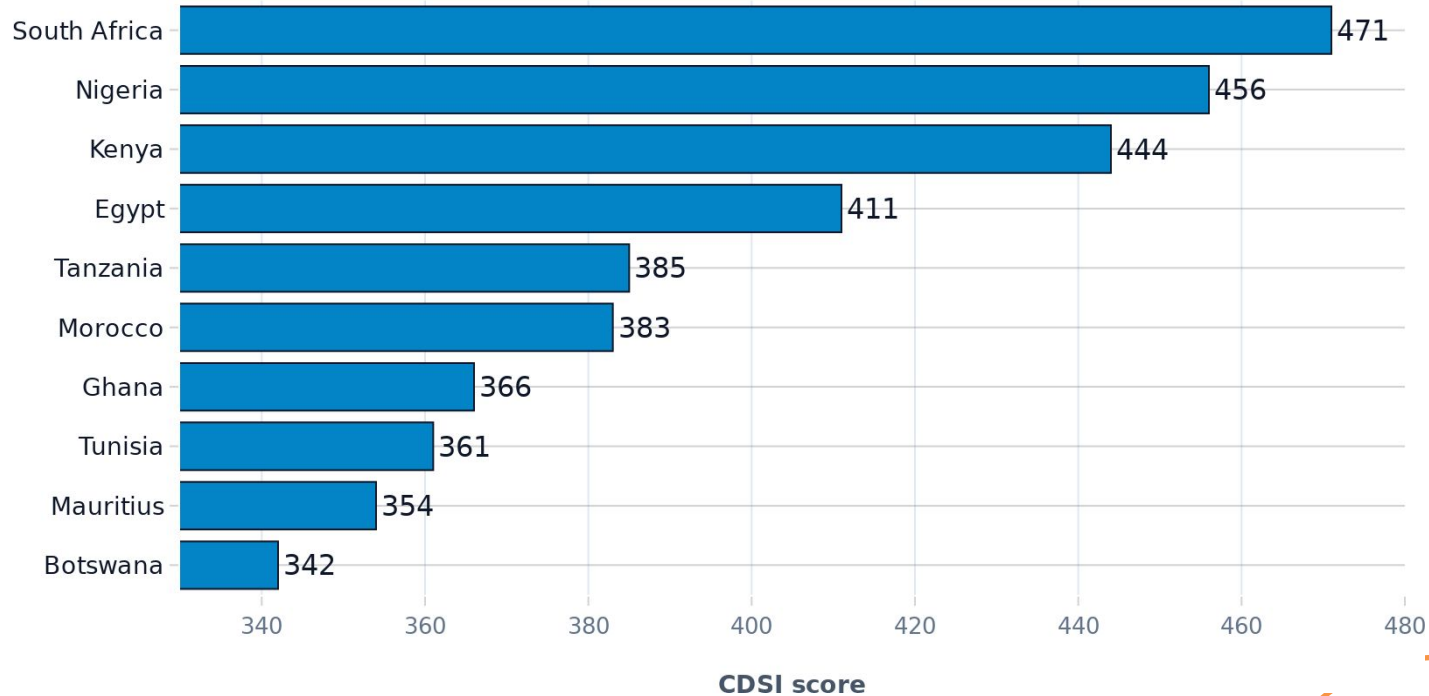
Powered by perplexity



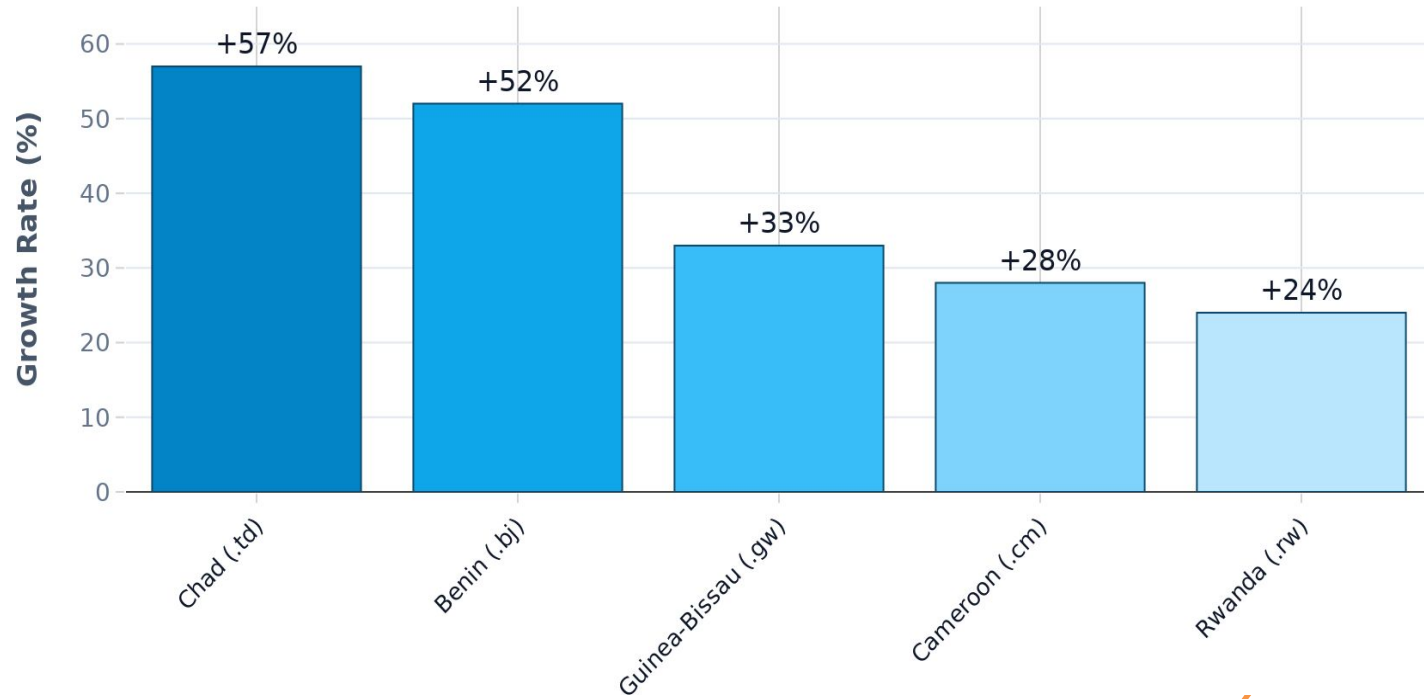
Domain Growth by Category (Africa)



CDSI Top 10 Rankings



Fastest-Growing ccTLDs



African Registrar Ecosystem at a Glance

300

2016

Local Registrars

4x Growth

1,200+

2026

Local Registrars

11

2016

ICANN-Accredited

Minimal Growth

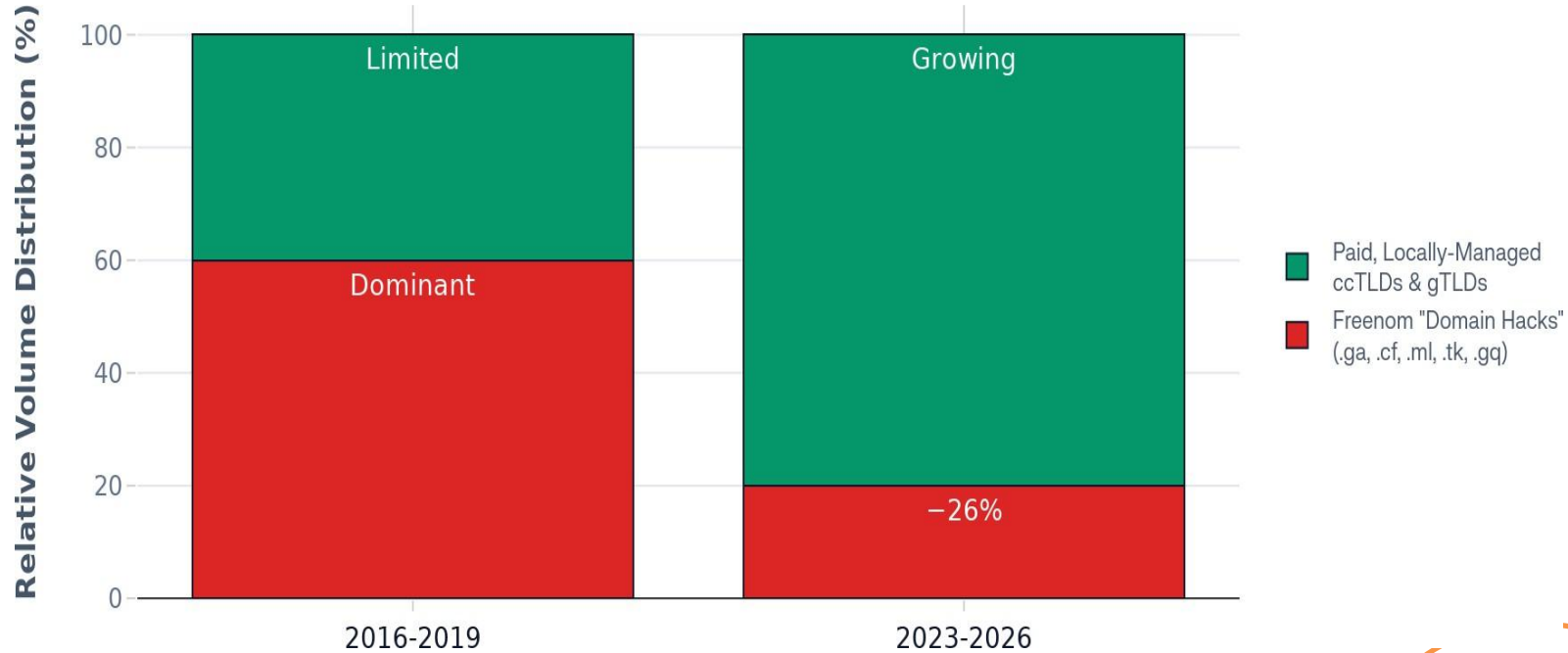
~15

2026

ICANN-Accredited



Shift: From Freenom Hacks to Sustainable Local Channels



💡 Key Takeaways:

Metric	2016	2026	Growth
Local Registrars/ Resellers	~300	1,200+	4× (300%)
ICANN- Accredited (Africa)	11	~15	Minimal (36%)
Ecosystem Quality	Freenom- dominated	Paid, sustainable channels	
Technology	Registry-direct, manual	EPP-based, automated	



References

- Africa DNS Study 2016
- Africa DNS Study 2023
- Onda.africa



Thank You!

Africa Top Level Domains Organization
Secretariat@aftld.org <http://www.aftld.org>

**Home of Africa National
TLDS**





Council of European National
Top-Level Domain Registries

ccTLD Market Session: Trends (1 of 2)

Registration and market trends

Duration: 30 min (inc. Q&A)

Date & Time: Tuesday, 10 March 2026

Trends: 15:00-16:00 local (09:30-10:30 UTC)

Format: Presentations + moderated Q&A and discussion

Patrick Myles

Focus of Today

European ccTLDs

- Registrations
- Domestic market share
- Domain usage
- DNSSEC adoption
- Retail domain pricing
- Concentration in sales channels

+ Beyond Europe and Emerging Trends

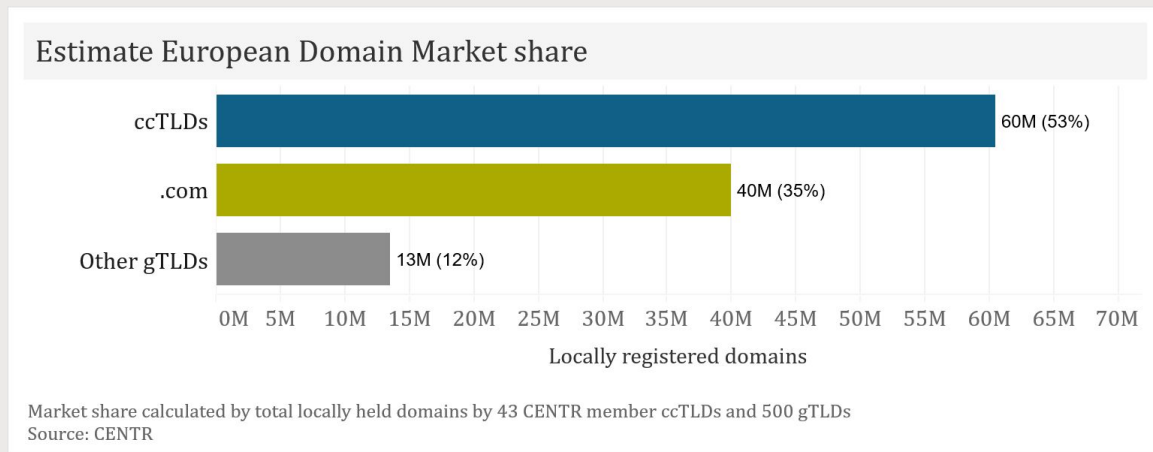


Part 1

Registration Trends



The European market by domain volume



- An estimated 114 million domains are registered by Europeans
- Europe represents roughly 30% of the global domain market

European ccTLD growth – a decade in review

Annual Domain Growth | European ccTLDs

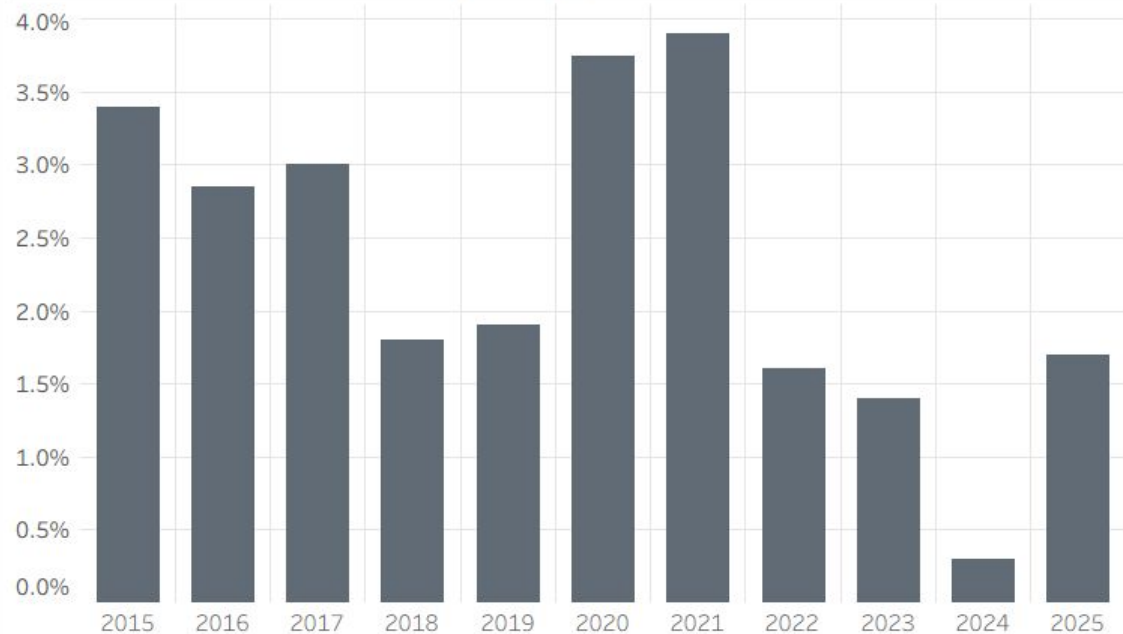


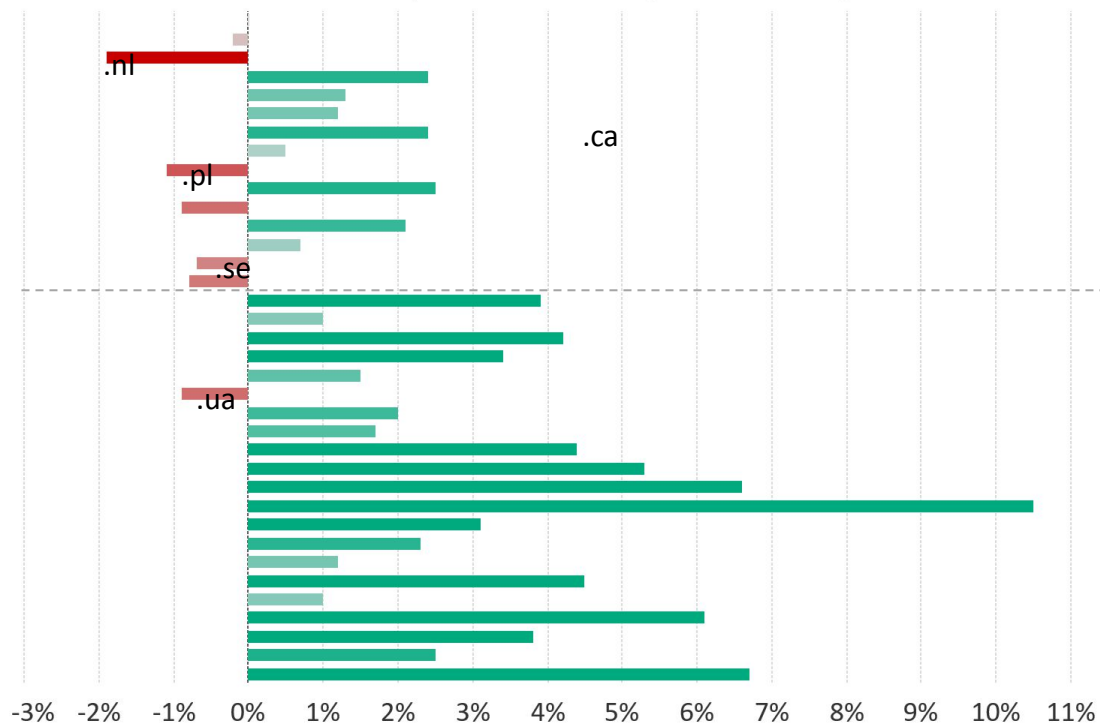
Chart shows median annual growth in domains calculated over top 30 CENTR full member ccTLDs

Source: CENTR

Domain Growth in European ccTLDs

Individual ccTLD Growth in 2025

CENTR full member ccTLDs. Ordered by domains under management, descending



Source: CENTR

Where are domains registered from?

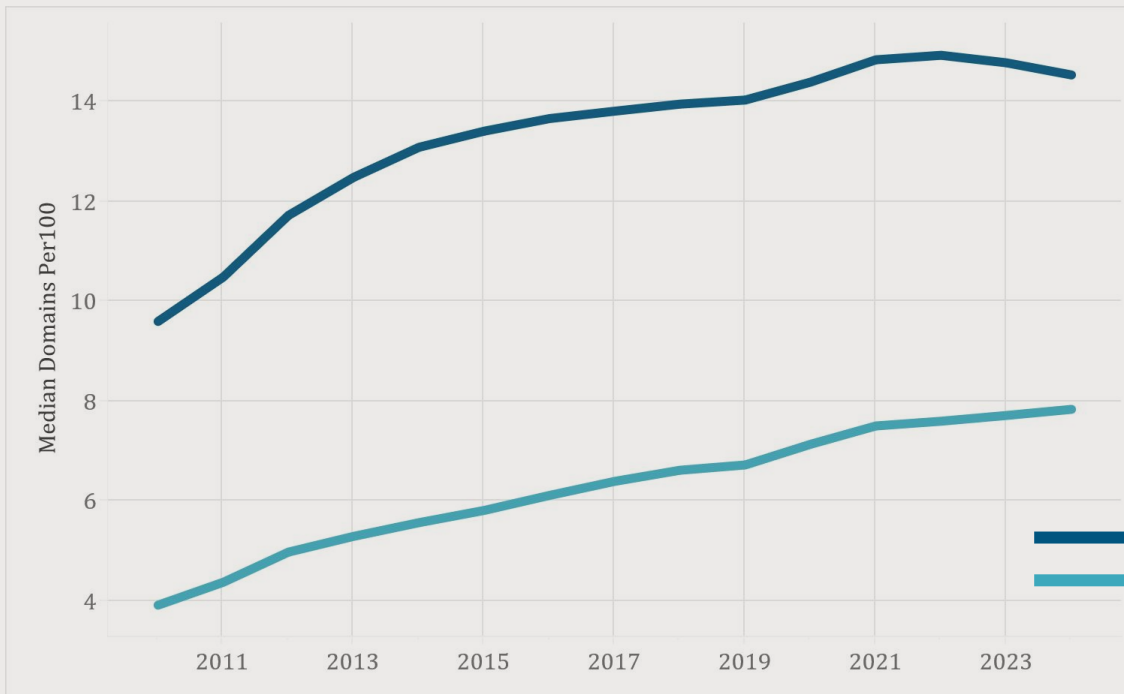
Local vs. Foreign registrations

- Median foreign-held share: 13% (Jan 2026)
- Up from 9% in 2015
- Peak of 14% in early 2023, modest retreat since



Measuring market saturation

Median Domains per 100 capita | European ccTLDs



Source: CENTR

Chart shows median value of 'domains per 100 population' over 30 full member ccTLDs grouped by registry size

Part 2

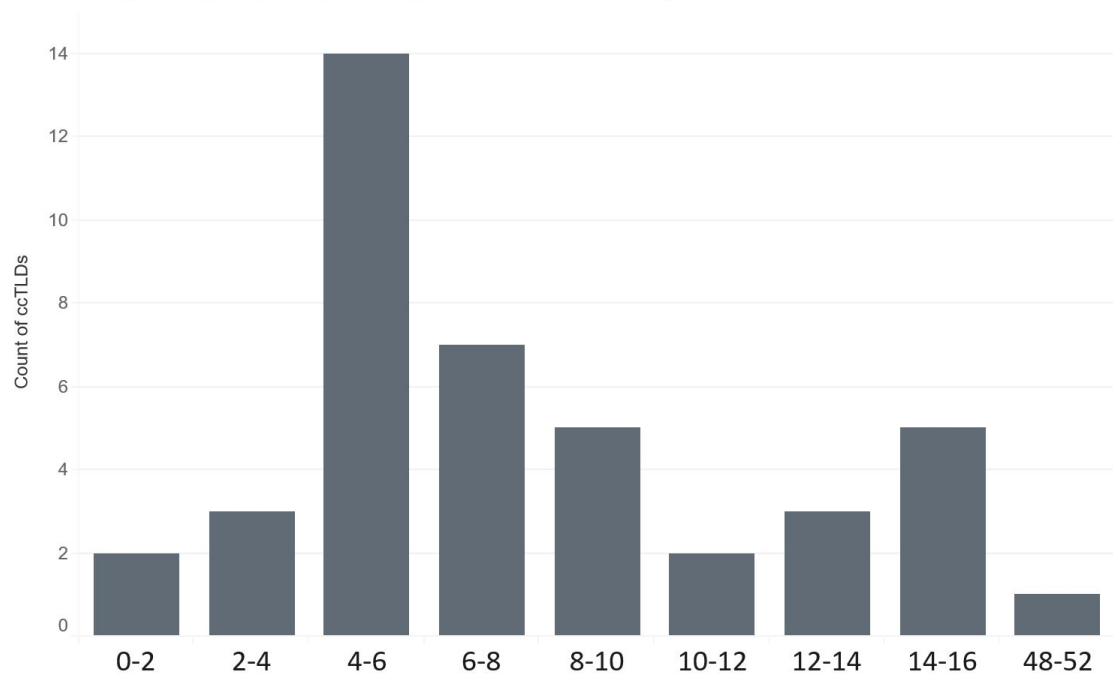
The cost to buy a domain



Wholesale (registry) pricing

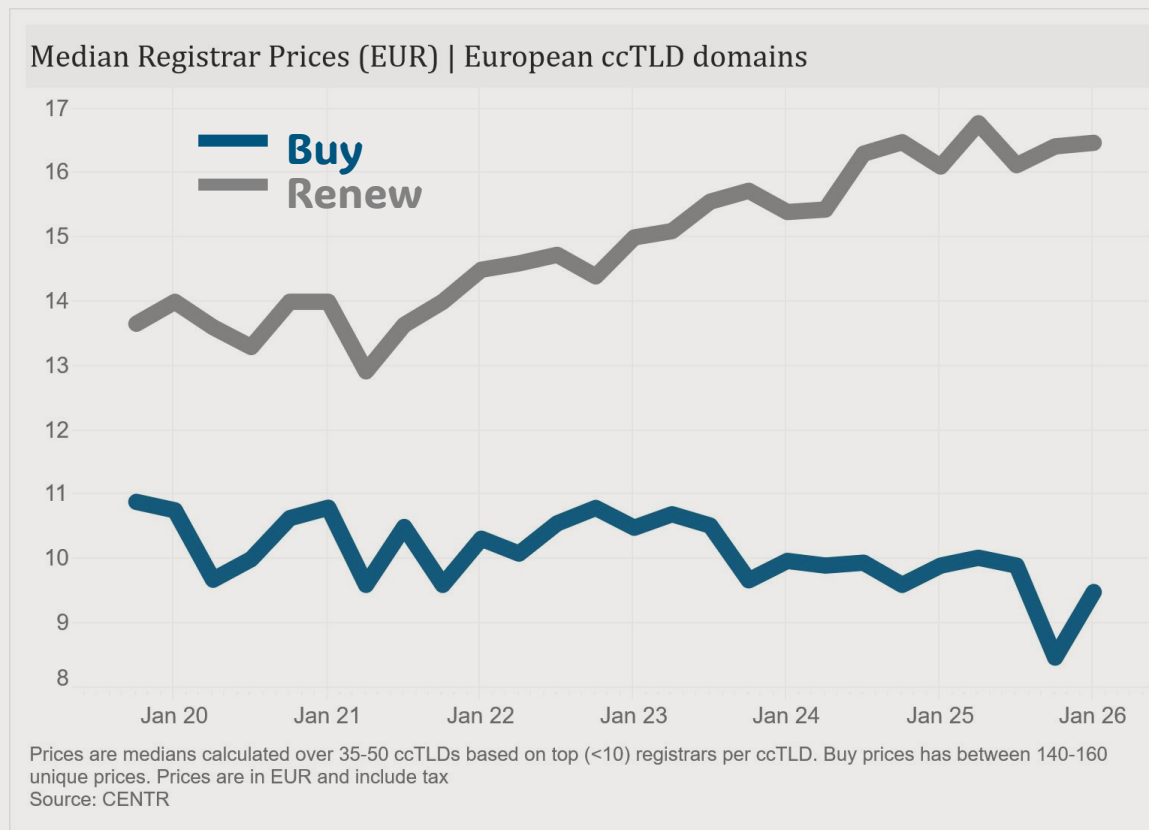
European ccTLD Wholesale Prices: Distribution Across Registries

Wholesale prices (EUR) charged to registrars across 41 European ccTLDs



Source: CENTR. Updated 2025

Retail pricing trends



Part 3

How domains are used



Assessing Domain Usage

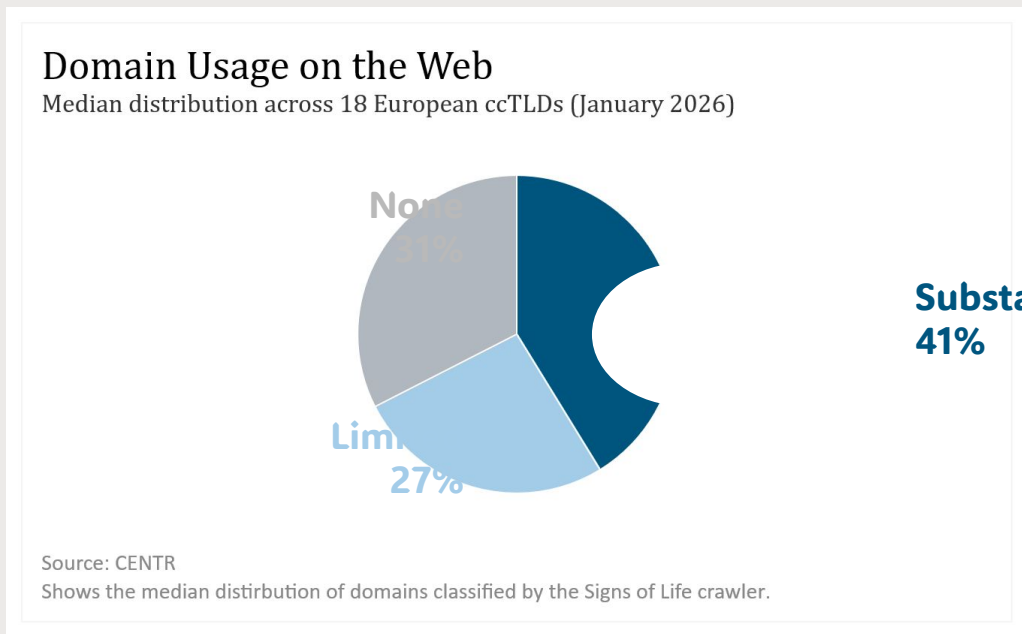
CENTR crawls domains over multiple TLDs to retrieve key usage indicators

Key Indicators

- Web content classification
- Dominant Languages
- Email and TLS configuration
- Technologies used
- Redirect patterns



Web classifications of European ccTLDs



Latest Snapshot (January 2026, 18 ccTLDs)

Other Domain attributes

Grouped by web classification of domain

Web Category	MX record/s	https	Redirect rate
Substantial content	82%	79%	26%
Limited content (parked)	74%	21%	9%
No web content	51%	-	-



DNSSEC Adoption

Measured as share domains with valid DNSSEC signatures

- Median : ~10% of signed
- 7 ccTLDs above 50% - driven by deliberate policy
- 16 ccTLDs below 10% - slow or stalled adoption
- Direction positive overall, but gap between leaders and laggards widening

Figures as at Jan 2026



Part 4

Concentration in the sales channel



Why study Registrar concentration

- Channel risk
- Competitive dynamics
- Negotiating leverage
- Policy decisions



Assessing Registrar concentration

1. HHI (Herfindahl-Hirschman Index)

Standard measure used by competition authorities. Summarises market concentration to a single number.

2. Normalised Percentage Share (alternative)

What percentage of significant [1] registrars are needed to hold 80% of combined domains?

[1] Significant = Registrars with $\geq 1\%$ market share. Typically, 8–26 significant registrars per ccTLD (median: 15)



Note: Analysis covers ccTLD domains only. Registrar portfolios may also include gTLD

Registrar concentration: Results

Category	HHI Method	Normalised Method
Competitive	17 (61%)	8 (29%)
Moderate	9 (32%)	18 (64%)
Concentrated	2 (7%)	2 (7%)

Classification of 28 European ccTLDs by registrar concentration

Bottom line: No major concentration concerns. Most markets sit in the moderate zone



Registrar concentration: Key Takeaways

- Only 2 of 28 markets are highly concentrated
- Most fall in the moderate zone when rigorously measured
- No widespread consolidation trend detected
- Action: Monitor your top 5-10 registrars



Part 5

ccTLD Strength in the Home Market



Measuring home market strength

Registrant location

Estimate of all domains held locally vs gTLD alternatives - gives a market share proxy

Open Street Map (OSM)

TLD choices of real-world businesses - gives a visibility/adoption signal



What the data shows

- Median ccTLD domestic market share: 49%
- Stable over time - structural entrenchment, not stagnation
- OSM: 75% of businesses use their national ccTLD
- Wide variation - Eastern Europe stronger; some Western markets more contested by .com

Median domestic share based on CENTR full members (Jan 2026). For each market, available data on locally registered ccTLD and gTLDs domains are summed.



A Brief Summary



Part 6

Beyond Europe



Beyond Europe

- 
- 23 Asia Pacific ccTLDs - range from 20M registrations to IDN ccTLDs with under 2,000
 - Penetration varies enormously: .au/.nz at European levels; India/Indonesia below 1 per 100
 - 11 of 14 APAC ccTLDs growing - but range too wide for regional averages to be meaningful
 - Buy and renewal prices at 26 USD (22 EUR)
 - Latin America: growth stable at 2-3%; renewal rates robust at 80-86%

Part 7

The invisible domains



The fading shopfront

- 
- AI answers directly
 - QR codes take users to destinations
 - Map and visual search
 - Social media
 - Email / browser clients hiding domains
 - Voice assistants
 - Zero-click search

Domains behind the scenes

- 
- Many domains are never meant to be public-facing
 - Internal systems, email, APIs, subdomains
 - Renew because operationally critical - not because of web visibility
 - Visibility pressures don't apply to this segment
 - Operational holders likely less sensitive to TLD choice

So far, so stable

- 
- Registration volumes stabilising after post-COVID correction
 - Renewal rates remaining robust
 - Domestic market share holding steady
 - No clear signal yet that visibility trends are translating into domain abandonment
 - Some segments may already be feeling pressure - speculative and defensive portfolios

Trends worth watching

- 
- Agentic AI - systems that act autonomously in the world - need stable, verifiable identities
 - "Vibe coding" - AI-assisted dev is reducing barriers to launching online applications

Why Data Sharing Matters

- No single registry sees the full picture
- Shared data separates local noise from genuine market trends
- AI is changing how domains are used - and how quickly patterns shift
- Collective insight is the only way to track what comes next





Council of European National
Top-Level Domain Registries

Thanks for your attention!

Questions/comments: patrick@centr.org





ICANN85 Market: Trends

How would you rate this session?



menti.com
7699 5171

Waiting for participants

Thank you!

Next session: