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Global Hyperscale Cloud Market Size Study & Forecast, by Enterprise Type (Small & Medium Enterprises, Large Enterprises), By Application (IoT Applications, Cloud Computing, Big Data Analytics, Others), By Industry (Manufacturing, Energy & Utilities, BFSI, Healthcare, E-Commerce & Retail, IT & Telecom, Automotive, Others), and Regional Analysis, 2023-2030

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Abstracts

Global Hyperscale Cloud Market is valued at approximately USD 172.26 billion in 2022 and is anticipated to grow with a healthy growth rate of more than 37.8% over the forecast period 2023-2030. Hyperscale cloud refers to a specific type of cloud computing architecture that is built to offer immense scalability, high performance, and flexibility to handle extremely high workloads and data volumes. The term is associated with significant public cloud service providers, such as Amazon Web Services (AWS), Microsoft Azure, Google Cloud Platform (GCP), and others. The increasing penetration of mobile and IoT devices, rising usage of cloud computing by various businesses, increasing availability of high-speed internet, and growing focus on disaster recovery and business continuity are the key factors bolstering the market demand across the globe.

Additionally, the growing adoption of 5G and escalating edge computing is providing various growth prospects for market expansion during the estimated period. 5G networks offer significantly faster data speeds and lower latency compared to previous generations. This enables the development of more advanced mobile applications and Internet of Things (IoT) solutions by combining with hyperscale cloud resources.

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Network operators currently are eager to capitalize on their 5G investment with software-defined infrastructure. According to the 5G Americas- an industry trade organization reported that approximately 1.9 billion of 5G connections were recorded, which is projected to rise and is likely to reach 5.9 billion 5G connections by 2027. With the hyperscale ecosystem facing increasing difficulties with issues related to memory, storage, bandwidth, computing power, and speed, 5G technologies are pushing more intelligence to the edge and presenting operators with previous options. 5G networks provide lower latency and higher data transfers, facilitating smoother real-time applications including online gaming, video gaming, and augmented reality/virtual reality. Thus, these aforementioned factors are propelling the growth of the Hyperscale Cloud Market. Moreover, the rise of artificial intelligence (AI) and machine learning (ML), as well as growing investment in technological advancements by the key market players present various lucrative opportunities over the forecast years. However, the increasing concerns regarding security breaches, along with the high cost of building and maintaining hyperscale cloud facilities are hampering the market growth throughout the forecast period of 2023-2030.

The key regions considered for the Global Hyperscale Cloud Market study include Asia Pacific, North America, Europe, Latin America, and Middle East & Africa. North America dominated the market in 2022 owing to the rising popularity of AI and ML among various businesses in a variety of industries, as well as the rising focus on processing large volumes of digital data. Additionally, the presence of significant hyperscalers such as AWS, Microsoft, Google, and others is further attributing to the regional market growth. The AAG (an IT technology company) estimated in July 2023 that Google, Microsoft, and Amazon are likely to dominate 66% of the cloud industry. Also, the report noted that in the United States, cloud computing in healthcare is predicted to increase by 40% between 2020 and 2025, Whereas, Asia Pacific is expected as the fastest growing region over the forecast years. The rising adoption of SaaS solutions, growing urbanization, coupled with the increasing utilization of digital technologies are the leading factors that are contributing towards the market demand across the region. Major regional companies are also concentrating on enhancing and growing their cloud infrastructure in order to build strong networks. For instance, in August 2022, Google intended to establish three additional cloud regions in Thailand, Malaysia, and Zealand to satisfy the rising demand for cloud services.

Major market players included in this report are:

Alibaba Group (China)

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Google LLC (Alphabet, Inc.) (U.S.)

Amazon Web Services, Inc. (U.S.)

Hewlett-Packard Enterprise Development LP (U.S.)

Fujitsu Limited (Japan)

IBM Corporation (U.S.)

Microsoft Corporation (U.S.)

Oracle Corporation (U.S.)

Salesforce, Inc. (U.S.)

VMware, Inc. (U.S.)

Recent Developments in the Market:

In June 2023, Informatica partnered with major hyperscalers including Microsoft, Amazon Web Services (AWS), and Google Cloud to broaden its offering in Australia and New Zealand. The partnership facilitated Informatica's network expansion and local market growth.

In March 2023, Amazon Web Services, Inc. and NVIDIA collaborated to create artificial intelligence (AI) infrastructure for generating generative AI software and machine learning (ML) models. The development comprises novel supercomputing hyperscale clusters named EC2 UltraClusters.

In February 2023. MongoDB launched a hyperscale cloud region in New Zealand. The company made use of its hyperscale capabilities by collaborating with significant hyperscalers including AWS, Microsoft Azure, and Google Cloud Platform.

Global Hyperscale Cloud Market Report Scope:

Historical Data – 2020 - 2021

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Base Year for Estimation – 2022

Forecast period - 2023-2030

Report Coverage - Revenue forecast, Company Ranking, Competitive Landscape, Growth factors, and Trends

Segments Covered - Enterprise Type, Application, Industry, Region

Regional Scope - North America; Europe; Asia Pacific; Latin America; Middle East & Africa

Customization Scope - Free report customization (equivalent up to 8 analyst's working hours) with purchase. Addition or alteration to country, regional & segment scope*

The objective of the study is to define market sizes of different segments & countries in recent years and to forecast the values to the coming years. The report is designed to incorporate both qualitative and quantitative aspects of the industry within countries involved in the study.

The report also caters detailed information about the crucial aspects such as driving factors & challenges which will define the future growth of the market. Additionally, it also incorporates potential opportunities in micro markets for stakeholders to invest along with the detailed analysis of competitive landscape and product offerings of key players. The detailed segments and sub-segment of the market are explained below:

By Enterprise Type:

Small & Medium Enterprises

Large Enterprises

By Application:

IoT Applications

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Cloud Computing

Big Data Analytics

Others

By Industry:

Manufacturing

Energy & Utilities

BFSI

Healthcare

E-Commerce & Retail

IT & Telecom

Automotive

Others

By Region:

North America

U.S.

Canada

Europe

UK

Germany

France

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Spain

Italy

ROE

Asia Pacific

China

India

Japan

Australia

South Korea

RoAPAC

Latin America

Brazil

Mexico

Middle East & Africa

Saudi Arabia

South Africa

Rest of Middle East & Africa

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