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Global Hyperscale Computing Market Size study & Forecast, by Offering (Solutions and Services), by Application (Cloud Computing, Big Data, IoT), by Vertical (Manufacturing, Government & Defense, BFSI, IT & Telecom, Retail & Consumer Goods) and Regional Forecasts 2025-2035

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Abstracts

The Global Hyperscale Computing Market is valued at approximately USD 49.78 billion in 2024 and is anticipated to grow at an explosive CAGR of 21.70% during the forecast period 2025-2035. Hyperscale computing refers to an infrastructure framework designed to scale up efficiently to support rapidly growing workloads, typically used in data centers handling cloud, IoT, and big data-driven operations. The technology allows organizations to accelerate innovation by handling unprecedented data volumes while offering flexibility and cost-effectiveness. Businesses worldwide are increasingly depending on hyperscale systems to streamline workloads, cut latency, and gain faster access to mission-critical applications. Market momentum is further propelled by the insatiable appetite for digital services, the exponential growth of connected devices, and the corporate rush to adopt cloud-first strategies, which have become a critical driver in reshaping the global IT landscape.

The global technology ecosystem has reached an inflection point where data growth has outpaced traditional IT infrastructure capabilities, driving a surge in demand for hyperscale systems. Organizations are leaning on hyperscale computing not only to improve storage and performance but also to facilitate advanced analytics, real-time insights, and AI-driven automation. According to industry data, cloud traffic has been growing at double-digit rates annually, while enterprise adoption of big data analytics continues to accelerate in almost every vertical. Meanwhile, the IoT ecosystem,

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forecasted to include tens of billions of devices by the end of the decade, represents one of the biggest catalysts fueling hyperscale infrastructure demand. However, despite the monumental opportunities, the market faces challenges such as soaring energy consumption, data center sustainability concerns, and the capital-intensive nature of deploying hyperscale infrastructure, which may temper growth in certain regions.

The detailed segments and sub-segments included in the report are:

By Offering:

Solutions

Services

By Application:

Cloud Computing

Big Data

IoT

By Vertical:

Manufacturing

Government & Defense

BFSI

IT & Telecom

Retail & Consumer Goods

By Region:

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North America

U.S.

Canada

Europe

UK

Germany

France

Spain

Italy

Rest of Europe

Asia Pacific

China

India

Japan

Australia

South Korea

Rest of Asia Pacific

Latin America

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Brazil

Mexico

Middle East & Africa

UAE

Saudi Arabia

South Africa

Rest of Middle East & Africa

Among the application segments, cloud computing is expected to dominate the market during the forecast horizon. As organizations transition their legacy workloads to cloud-based environments, hyperscale computing has become the backbone of digital transformation strategies. With global enterprises prioritizing agility and scalability, the cloud segment accounts for the lion’s share of demand. The shift is amplified by the proliferation of SaaS applications, hybrid and multi-cloud deployments, and the growing urgency for resilient disaster recovery solutions. While cloud computing leads the way in terms of adoption and installed base, IoT-driven applications are emerging as the fastest-growing frontier. As billions of connected devices stream real-time data, IoT requires unparalleled storage and processing capabilities that only hyperscale infrastructures can deliver.

From the offering perspective, solutions currently account for the majority of revenue in the hyperscale computing market. Hardware, networking, and integrated infrastructure systems dominate spending, given the upfront requirements to build hyperscale facilities that can handle high-volume workloads. Solutions provide the critical architecture that enterprises rely upon to maintain continuity and performance in complex environments. However, services are rapidly gaining ground, fueled by managed offerings, consulting, and ongoing optimization needs, which enterprises increasingly outsource to specialized providers. This dual narrative—solutions leading revenue while services accelerate growth—underscores the evolving nature of hyperscale computing’s value proposition.

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Geographically, North America commanded the largest market share in 2025, a dominance attributed to its advanced digital ecosystem, extensive hyperscale data center presence, and the leadership of U.S.-based tech giants who have pioneered hyperscale models. With robust cloud adoption rates across industries and significant investments from Amazon, Microsoft, and Google, the region remains the innovation hub of hyperscale computing. Meanwhile, Asia Pacific is set to be the fastest-growing region throughout the forecast period, with China and India spearheading adoption due to their massive digital user base, booming e-commerce, and government-backed digital transformation programs. Europe, on the other hand, shows steady growth, driven by strong data privacy regulations and a surge in regional data center buildouts, while Latin America and the Middle East & Africa gradually catch up as cloud adoption matures.

Major market players included in this report are:

Amazon Web Services, Inc.

Microsoft Corporation

Google LLC

IBM Corporation

Cisco Systems, Inc.

Oracle Corporation

Hewlett Packard Enterprise (HPE)

Dell Technologies Inc.

Intel Corporation

Nvidia Corporation

Huawei Technologies Co., Ltd.

Alibaba Cloud

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Salesforce, Inc.

SAP SE

Fujitsu Ltd.

Global Hyperscale Computing Market Report Scope:

Historical Data – 2023, 2024

Base Year for Estimation – 2024

Forecast period - 2025-2035

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

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

Customization Scope - Free report customization (equivalent to up to 8 analysts' 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 for the coming years. The report is designed to incorporate both qualitative and quantitative aspects of the industry within the countries involved in the study. The report also provides detailed information about crucial aspects, such as driving factors and challenges, which will define the future growth of the market. Additionally, it incorporates potential opportunities in micro-markets for stakeholders to invest, along with a detailed analysis of the competitive landscape and product offerings of key players. The detailed segments and sub-segments of the market are explained below:

Key Takeaways:

Market Estimates & Forecast for 10 years from 2025 to 2035.

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Annualized revenues and regional-level analysis for each market segment.

Detailed analysis of the geographical landscape with country-level analysis of major regions.

Competitive landscape with information on major players in the market.

Analysis of key business strategies and recommendations on future market approach.

Analysis of the competitive structure of the market.

Demand side and supply side analysis of the market.

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