

Global Cloud Network Integrated Data Center Supply, Demand and Key Producers, 2026-2032

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Abstracts

The global Cloud Network Integrated Data Center market size is expected to reach \$ 194119 million by 2032, rising at a market growth of 12.8% CAGR during the forecast period (2026-2032).

A cloud-network integrated data center refers to a data center paradigm characterized by the unified planning, scheduling, and operations and maintenance of cloud computing resources, data center infrastructure, and network connectivity capabilities. By deeply integrating computing, storage, networking, security, edge nodes, and cloud service platforms, it realizes a resource provisioning model where 'the cloud moves with the network, the network adjusts to the cloud, and the cloud and network operate in synergy.' Its core objective is not merely the construction of server rooms or server clusters; rather, it leverages the data center as a foundation for computing power, a high-speed and low-latency network as the connective link, and a cloud platform as the gateway for resource scheduling. This framework provides elastic computing power, reliable networking, secure isolation, and unified management capabilities for various scenarios?including government and enterprise digitalization, the Industrial Internet, finance, video cloud services, AI training and inference, edge computing, and cross-regional data collaboration.

The upstream segment of the cloud-network integrated data center industry chain primarily encompasses servers, GPUs/CPUs, storage devices, switches/routers, optical modules, server cabinets, UPS power supplies, liquid/air cooling systems, IDC civil engineering and electromechanical infrastructure, optical transmission networks, foundational software, and security equipment. The midstream segment consists of the builders and operators of these integrated data centers, who are responsible for data center planning and construction, computing resource pooling, cloud platform

deployment, backbone/metropolitan/dedicated line connectivity, network scheduling, security protection, operations and maintenance monitoring, and resource billing. The downstream segment primarily serves scenarios such as government clouds, finance, the Internet sector, the Industrial Internet, large-scale AI model training and inference, video cloud services, disaster recovery, edge computing, and enterprise cloud migration. The gross margin for cloud-network integrated data centers stands at approximately 39%.

In terms of infrastructure attributes, cloud-network integrated data centers have evolved from traditional IDC facilities into comprehensive foundational platforms supporting 'computing power, networking, cloud platforms, and security capabilities.' While traditional data centers prioritize racks, power supply, cooling, and server colocation, cloud-network integrated data centers emphasize the pooled scheduling of computing resources, cross-regional network connectivity, the elastic allocation of cloud resources, and unified operations and maintenance (O&M) management. Driven by the migration of government agencies and enterprises to the cloud, the Industrial Internet, financial digitalization, AI training and inference, and the growing demand for edge computing, customers no longer merely require a 'room to house servers'; instead, they demand stable, low-latency, highly secure, and scalable integrated cloud-network service capabilities.

From the perspective of the competitive landscape, the core barriers to entry for cloud-network integrated data centers lie in network resources, cloud platform capabilities, computing power supply capacity, and operational efficiency. Telecommunications operators possess inherent advantages in backbone networks, metropolitan area networks, dedicated lines, and edge nodes, making them well-positioned to develop cloud services for government and enterprise sectors, industry-specific clouds, and cross-regional networking services. Third-party IDC providers excel in data center construction, O&M efficiency, and customer service. Cloud vendors, conversely, specialize in bundling computing, storage, databases, AI platforms, and development tools into comprehensive cloud services. Consequently, competition within this industry is no longer limited to the scale of land, power supply, and rack capacity; it is gradually shifting toward a competition of comprehensive capabilities encompassing 'cloud resources + network connectivity + computing resource scheduling + industry-specific solutions.'

Regarding future trends, cloud-network integrated data centers are poised to evolve in the directions of green and low-carbon operations, intelligent O&M, AI-centric computing, and edge-cloud collaboration. On one hand, given the high energy

consumption inherent to data centers, future competition will increasingly hinge on key metrics such as liquid cooling technologies, waste heat recovery, green electricity procurement, and Power Usage Effectiveness (PUE) optimization. On the other hand, the emergence of large-scale AI models is driving demand for GPU clusters, high-speed interconnects, and low-latency networks, thereby propelling the transformation of data centers from generic computing hubs into specialized intelligent computing centers. In the future, enterprises that possess integrated capabilities spanning 'central cloud + edge cloud + dedicated networks + AI computing power + security management' will be better positioned to secure long-term contracts from clients across the government, enterprise, finance, manufacturing, energy, and internet sectors.

This report studies the global Cloud Network Integrated Data Center demand, key companies, and key regions.

This report is a detailed and comprehensive analysis of the world market for Cloud Network Integrated Data Center, and provides market size (US\$ million) and Year-over-Year (YoY) growth, considering 2025 as the base year. This report explores demand trends and competition, as well as details the characteristics of Cloud Network Integrated Data Center that contribute to its increasing demand across many markets.

Highlights and key features of the study

Global Cloud Network Integrated Data Center total market, 2021-2032, (USD Million)

Global Cloud Network Integrated Data Center total market by region & country, CAGR, 2021-2032, (USD Million)

U.S. VS China: Cloud Network Integrated Data Center total market, key domestic companies, and share, (USD Million)

Global Cloud Network Integrated Data Center revenue by player, revenue and market share 2021-2026, (USD Million)

Global Cloud Network Integrated Data Center total market by Type, CAGR, 2021-2032, (USD Million)

Global Cloud Network Integrated Data Center total market by Application, CAGR, 2021-2032, (USD Million)

This report profiles major players in the global Cloud Network Integrated Data Center market based on the following parameters - company overview, revenue, gross margin, product portfolio, geographical presence, and key developments. Key companies covered as a part of this study include Amazon Web Services, Microsoft, Google Cloud, Oracle, Equinix, Digital Realty, OVHcloud, Orange Business, T-Systems, Telefonica Tech, etc.

This report also provides key insights about market drivers, restraints, opportunities, new product launches or approvals.

Stakeholders would have ease in decision-making through various strategy matrices used in analyzing the world Cloud Network Integrated Data Center market

Detailed Segmentation:

Each section contains quantitative market data including market by value (US\$ Millions), by player, by regions, by Type, and by Application. Data is given for the years 2021-2032 by year with 2025 as the base year, 2026 as the estimate year, and 2027-2032 as the forecast year.

Global Cloud Network Integrated Data Center Market, By Region:

United States

China

Europe

Japan

South Korea

ASEAN

India

Rest of World

Global Cloud Network Integrated Data Center Market, Segmentation by Type:

Private Cloud

Public Cloud

Hybrid Cloud

Global Cloud Network Integrated Data Center Market, Segmentation by Deployment Location:

Core Data Center (Service Radius > 500 km)

Regional Data Center (Service Radius 100?500 km)

Urban Data Center (Service Radius 10?100 km)

Edge Data Center (Service Radius

Global Cloud Network Integrated Data Center Market, Segmentation by Energy Efficiency Level:

High-Energy-Consumption Data Center

Conventional Data Center

Global Cloud Network Integrated Data Center Market, Segmentation by Application:

Large Enterprises

SMEs

Companies Profiled:

Amazon Web Services

Microsoft

Google Cloud

Oracle

Equinix

Digital Realty

OVHcloud

Orange Business

T-Systems

Telefonica Tech

China Telecom

China Mobile

China Unicom

Alibaba Cloud

Huawei

Tencent Cloud

Baidu

NTT DATA

KDDI

SoftBank

Key Questions Answered

1. How big is the global Cloud Network Integrated Data Center market?
2. What is the demand of the global Cloud Network Integrated Data Center market?
3. What is the year over year growth of the global Cloud Network Integrated Data Center market?
4. What is the total value of the global Cloud Network Integrated Data Center market?

5. Who are the Major Players in the global Cloud Network Integrated Data Center market?
6. What are the growth factors driving the market demand?

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