

Mainframe Modernization Market Size, Share & Trends Analysis Report By Component (Software, Services), By Organization Size (Large Enterprises & SMEs), By Vertical (BFSI, IT & Healthcare, Retail), By Region, And Segment Forecasts, 2025 - 2033

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Abstracts

The global mainframe modernization market size was valued at USD 7.91 billion in 2024 and is projected to reach USD 18.19 billion by 2033, growing at a CAGR of 9.8% from 2025 to 2033. The mainstream modernization market is primarily driven by the growing need for digital transformation, legacy system upgrades, and enhanced operational efficiency.

Increasing cloud adoption, rising demand for cost optimization, and integration of AI and automation technologies further accelerate modernization initiatives, enabling enterprises to remain competitive and agile in a rapidly evolving business landscape.

The mainstream modernization market is witnessing significant growth as enterprises increasingly prioritize digital transformation to remain competitive. One of the major driving factors is the growing need to replace outdated legacy systems, which often hinder agility, scalability, and cost efficiency. Organizations are adopting modernization strategies to streamline workflows, reduce maintenance costs, and ensure compatibility with next-generation applications, making it easier to respond to market changes and customer expectations. Additionally, modernization enables better alignment between IT infrastructure and business goals, empowering organizations to innovate rapidly. As customer demands evolve and competitors embrace advanced technologies, companies are compelled to modernize to stay relevant, achieve faster time-to-market, and strengthen long-term growth.

The rapid adoption of cloud-based platforms and services is also driving the growth of the mainframe modernization market. Businesses are migrating core operations to hybrid and multi-cloud environments to enhance flexibility, security, and data accessibility. Cloud integration supports real-time decision-making and enables cost optimization and scalability, critical for managing growing workloads and distributed teams. Moreover, cloud modernization allows enterprises to integrate advanced analytics, automation, and AI-driven solutions seamlessly, providing deeper insights and improved operational agility. The ability to scale infrastructure on-demand, ensure business continuity, and reduce capital expenses is further fueling modernization initiatives, as organizations seek to maintain resilience and future readiness.

In addition, technological advancements such as artificial intelligence, machine learning, and automation are accelerating modernization initiatives. Enterprises are leveraging these innovations to improve data analytics, enhance user experiences, and drive operational efficiency. With increasing regulatory compliance needs and security concerns, organizations are investing heavily in modernization solutions to future-proof operations and maintain resilience in an evolving business landscape. Furthermore, advanced modernization frameworks enable businesses to enhance collaboration, reduce manual intervention, and ensure higher levels of transparency. The growing need to mitigate risks, improve decision-making, and strengthen cybersecurity is also encouraging enterprises to embrace modernization as a strategic priority, creating long-term value across industries.

Global Mainframe Modernization Market Report Segmentation

This report forecasts revenue growth at global, regional, and country levels and provides an analysis of the latest industry trends in each of the sub-segments from 2021 to 2033. For this study, Grand View Research has segmented global mainframe modernization market report based on component, organization size, vertical, and region.

Component Outlook (Revenue, USD Billion, 2021 - 2033)

Software

Services

Organization Size Outlook (Revenue, USD Billion, 2021 - 2033)

Large Enterprises

SMEs

Vertical Outlook (Revenue, USD Billion, 2021 - 2033)

BFSI

IT & ITes

Healthcare

Retail

Media & Entertainment

Education

Manufacturing

Others

Regional Outlook (Revenue, USD Billion, 2021 - 2033)

North America

U.S.

Canada

Mexico

Europe

Germany

UK

France

Asia Pacific

China

Japan

India

South Korea

Australia

Latin America

Brazil

Middle East and Africa (MEA)

UAE

KSA

South Africa

This report can be delivered to the clients within 3 Business Days

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