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Infrastructure-as-a-Service (IaaS) Market - A Global Market Overview

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Abstracts

Global Infrastructure-as-a-Service (IaaS) Market Trends and Outlook

The global Infrastructure-as-a-Service (IaaS) market is undergoing rapid expansion as organizations across all sectors accelerate their digital transformation journeys. Valued at US$98 billion in 2024, the market is projected to more than triple to US$354.2 billion by 2030, growing at a robust CAGR of 23.9%. IaaS enables businesses to access scalable, on-demand infrastructure, such as compute, storage, and networking, without investing heavily in physical hardware. Its flexible pay-as-you-go model appeals to startups, SMEs, and large enterprises alike, offering cost efficiency, agility, and rapid deployment of services. The adoption of hybrid work models, remote teams, and data-intensive applications like AI/ML, IoT, and big data analytics is further accelerating demand for elastic and reliable cloud infrastructure.

Enterprises in key industries such as BFSI, healthcare, retail, and manufacturing are leveraging IaaS to modernize legacy systems, improve business continuity, and streamline operations. Hybrid cloud is emerging as the dominant deployment model, allowing businesses to balance performance, compliance, and cost. At the same time, public cloud services are growing rapidly, particularly among SMEs seeking affordability and scalability. Regionally, North America leads in market share due to its mature IT landscape and cloud-first initiatives, while Asia-Pacific is expected to post the fastest growth fueled by aggressive digitalization, government-led cloud policies, and surging SME demand. As cloud-native applications become the norm and enterprises demand greater flexibility, the role of IaaS will be central in enabling resilient, future-ready IT ecosystems.

Infrastructure-as-a-Service (IaaS) Regional Market Analysis

North America, with an estimated share of 36.8% in 2024, is the leading global market for Infrastructure-as-a-Service (IaaS). The region's robust and well-established IT ecosystem with extensive data center networks, high-speed internet and advanced technological frameworks help in the seamless adoption of IaaS. Leading cloud providers, such as Amazon Web Services (AWS), Microsoft Azure and Google Cloud with headquarters in North America, are engaged in providing cutting-edge services, aided by extensive regional data centers and strong market penetration. Companies across the BFSI, healthcare, retail and IT/telecom sectors in the region have adopted or are in the process of adopting cloud solutions because of their scalability and cost-efficiency. Demand for IaaS in North America is also being boosted by a mature economy and supportive government policies, including incentives for digital transformation and cybersecurity standards. As regards growth, though, the market for IaaS in Asia-Pacific is expected to post the fastest 2024-2030 CAGR of 28.7% on the back of rapid digital transformation the region is undergoing. Businesses and governments in China, India and Southeast Asian countries have initiated aggressive digitalization steps and are investing huge amounts in cloud technologies to modernize operations. The region's large and fast-growing small and medium enterprises (SMEs) have increased the adoption of IaaS to reduce IT costs and enhance scalability. Governments across various countries are encouraging cloud adoption by offering subsidies, digital infrastructure investments and policies promoting cloud-first strategies.

Infrastructure-as-a-Service (IaaS) Market Analysis by Component Type

Accounting for an estimated share of 40.9% in 2024, the worldwide market for IaaS by component type is the largest for Compute, one factor for which is the central role it plays in cloud infrastructure. Compute resources, such as virtual machines (VMs), containers, and serverless computing constitute the mainstay of IaaS, powering applications, workloads and processing tasks across industries that renders it the most critical and widely used component. Organizations are highly dependent on compute resources for data-intensive applications, including AI/ML, big data analytics and high-performance computing (HPC), which drives considerable investment in scalable computing infrastructure. Storage, however, is likely to emerge as the fastest growing component type, with a forecast CAGR of 28% over 2024-2030. Growth in demand for scalable, cost-effective cloud storage solutions for managing vast datasets is being spurred by the increase in data generation from IoT devices, big data analytics and digital transformation initiatives, driving demand for storage. The need for disaster recovery (e.g., Disaster Recovery as a Service, DRaaS) and backup solutions to maintain business continuity is also instrumental in driving demand for cloud storage to ensure data redundancy and quick recovery.

Infrastructure-as-a-Service (IaaS) Market Analysis by Deployment Type

Hybrid Cloud leads the global demand for IaaS in terms of deployment type with a share estimated at 48.6% in 2024. The ability of hybrid cloud to combine on-premises infrastructure, i.e., private cloud, with public cloud services, enables organizations to allocate workloads based on specific needs. While sensitive or critical workloads, such as financial data or intellectual property, remain on private clouds for control and compliance, other less-sensitive workloads, like web apps or testing environments, leverage the scalability of public clouds. On the other hand, the worldwide market for Public Cloud deployment in IaaS will likely record the fastest 2024-2030 CAGR of 26.8% owing to a range of factors. The virtually unlimited scalability offered by public cloud allows for the instant upscaling or downscaling of businesses to address spikes in demand. Elasticity as evident here is a boon for startups, SMEs and enterprises with variable workloads, with the pay-as-you-go model ensuring that organizations pay only for resources availed of.

Infrastructure-as-a-Service (IaaS) Market Analysis by Company Type

Estimated to corner a share of 59.8% in 2024, worldwide demand for IaaS by company type is led by Large Enterprises because of having financial resources to invest in comprehensive IaaS solutions, including private and hybrid cloud deployments. Leading providers, such as AWS, Azure and Google Cloud can provide large businesses with tailored solutions for addressing specific requirements, with their budgets allowing supporting large-scale migrations and long-term cloud strategies. Finance, healthcare and government are sectors dominated by large enterprises, which face strict regulatory requirements. However, the global market for IaaS as being adopted by Small & Medium-sized Enterprises (SMEs) is slated to clock the faster 2024-2030 CAGR of 25.8%, with cost efficiency and no upfront investment being a crucial factor. As is common with SMEs, the lack of capital for on-premises infrastructure can be overcome by IaaS's pay-as-you-go model, allowing them access to enterprise-grade infrastructure without significant investment. This cost efficiency is helping SMEs to grow in terms of lean operations and scalability.

Infrastructure-as-a-Service (IaaS) Market Analysis by Industry Sector

BFSI (Banking, Financial Services & Insurance) is the largest industry sector for IaaS at an estimated 2024 share of 19.2%. Institutions operating in this area handle huge amounts of transactional and customer data, for which IaaS provides scalable, high-performance computing resources through it can be managed efficiently. The need for robust infrastructure as required for Core banking systems, payment processing and risk analytics is delivered by IaaS platforms, such as AWS, Microsoft Azure and Google Cloud. Complying with regulations and security protocols is enabled by IaaS providers through compliance-ready infrastructure with built-in security features, including encryption, identity management and audit trails, which reduce the onus on BFSI firms to build compliant systems from scratch. With regard to growth, the worldwide market for IaaS in the Healthcare sector is likely to witness the fastest 2024-2030 compounded annual rate of 30.1%, a key factor for which is the rapid surge in digital health, telemedicine and remote patient monitoring, especially after the COVID-19 pandemic. These applications need scalable infrastructure that can be provided by IaaS to enable real-time data processing and secure storage for telehealth services. The massive amounts of data generated from electronic health records (EHRs), medical imaging and genomics need big data analytics and AI-driven tools for precision medicine, clinical decision support and predictive analytics, all of which are supported by IaaS to further stimulate adoption. Regulations, such as HIPAA in the US and similar global policies necessitate security and scalability in data management. For this, IaaS providers offer solutions compliant with these standards that are helping healthcare organizations to store and process sensitive patient data securely.

Infrastructure-as-a-Service (IaaS) Market Report Scope

This global report on Infrastructure-as-a-Service (IaaS) analyzes the market based on Component Type, Deployment Type, Company Type and Industry Sector for the period 2021-2030 with forecasts from 2024 to 2030 in terms of value in US$. In addition to providing profiles of major companies operating in this space, the latest corporate and industrial developments have been covered to offer a clear panorama of how and where the market is progressing.

Key Metrics

Historical Period: 2021-2024
Base Year: 2024
Forecast Period: 2024-2030
Units: Value market in US$
Companies Mentioned: 25+

Infrastructure-as-a-Service (IaaS) Market by Geographic Region

North America (United States, Canada and Mexico)

Europe (Germany, United Kingdom, France, Italy, Netherlands, Spain, Russia, Switzerland and Rest of Europe)

Asia-Pacific (China, Japan, India, Australia, Singapore, South Korea and Rest of Asia-Pacific)

South America (Brazil, Argentina, Colombia, Chile, Peru and Rest of South America)

Middle East & Africa (United Arab Emirates, South Africa, Egypt, Saudi Arabia, Morocco, Kuwait, Qatar and Rest of Middle East & Africa)

Infrastructure-as-a-Service (IaaS) Market by Component Type

Compute

Storage

Network

Other Component Types

Infrastructure-as-a-Service (IaaS) Market by Deployment Type

Hybrid Cloud

Public Cloud

Private Cloud

Infrastructure-as-a-Service (IaaS) Market by Company Type

Large Enterprises

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Small & Medium-sized Enterprises (SMEs)

Infrastructure-as-a-Service (IaaS) Market by Industry Sector

BFSI (Banking, Financial Services, Insurance)

IT & Telecom

Manufacturing

Government

Healthcare

Retail & Ecommerce

Energy & Utilities

Transportation

Education

Other Industries

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Accenture
Akamai Technologies Inc.
Alibaba Group Holding Limited
Alphabet Inc.
Amazon Web Services, Inc.
AT and T Inc.
Cisco Systems Inc.
Datacom Group Ltd.
Dell Technologies Inc.
DigitalOcean Holdings Inc.
DXC Technology
Fujitsu Ltd.
Google Inc.
HCL Technologies Ltd.
Hewlett Packard Enterprise Co.
International Business Machines Corp.
Linode (Akamai)
Microsoft Corp.
Mindtree Pvt. Ltd.
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Transportation
Education
Others

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REGIONAL MARKET OVERVIEW

Global Infrastructure-as-a-Service (IaaS) Market Overview by Geographic Region

6. NORTH AMERICA

North American Infrastructure-as-a-Service (IaaS) Market Overview by Geographic Region
North American Infrastructure-as-a-Service (IaaS) Market Overview by Component Type

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