

Global Cloud Network Integrated Data Center Market Growth (Status and Outlook) 2026-2032

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Abstracts

The global Cloud Network Integrated Data Center market size is predicted to grow from US\$ 79247 million in 2025 to US\$ 192520 million in 2032; it is expected to grow at a CAGR of 13.6% from 2026 to 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.

LPI (LP Information)' newest research report, the 'Cloud Network Integrated Data Center Industry Forecast' looks at past sales and reviews total world Cloud Network Integrated Data Center sales in 2025, providing a comprehensive analysis by region and market sector of projected Cloud Network Integrated Data Center sales for 2026 through 2032. With Cloud Network Integrated Data Center sales broken down by region, market sector and sub-sector, this report provides a detailed analysis in US\$ millions of the world Cloud Network Integrated Data Center industry.

This Insight Report provides a comprehensive analysis of the global Cloud Network Integrated Data Center landscape and highlights key trends related to product segmentation, company formation, revenue, and market share, latest development, and M&A activity. This report also analyses the strategies of leading global companies with a focus on Cloud Network Integrated Data Center portfolios and capabilities, market entry strategies, market positions, and geographic footprints, to better understand these firms' unique position in an accelerating global Cloud Network Integrated Data Center market.

This Insight Report evaluates the key market trends, drivers, and affecting factors shaping the global outlook for Cloud Network Integrated Data Center and breaks down the forecast by Type, by Application, geography, and market size to highlight emerging pockets of opportunity. With a transparent methodology based on hundreds of bottom-up qualitative and quantitative market inputs, this study forecast offers a highly nuanced view of the current state and future trajectory in the global Cloud Network Integrated Data Center.

This report presents a comprehensive overview, market shares, and growth opportunities of Cloud Network Integrated Data Center market by product type, application, key players and key regions and countries.

Segmentation by Type:

Private Cloud

Public Cloud

Hybrid Cloud

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

Segmentation by Energy Efficiency Level:

High-Energy-Consumption Data Center

Conventional Data Center

Segmentation by Application:

Large Enterprises

SMEs

This report also splits the market by region:

Americas

United States

Canada

Mexico

Brazil

APAC

China

Japan

Korea

Southeast Asia

India

Australia

Europe

Germany

France

UK

Italy

Russia

Middle East & Africa

Egypt

South Africa

Israel

Turkey

GCC Countries

The below companies that are profiled have been selected based on inputs gathered from primary experts and analyzing the company's coverage, product portfolio, its market penetration.

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

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