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Hyperscale Computing Market by Offering (Solutions and Services), Application (Cloud Computing, Big Data, IoT), Vertical (Manufacturing, Government & Defense, BFSI, IT & Telecom, Retail & Consumer Goods) and Region - Global Forecast to 2028

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Abstracts

The hyperscale computing market size is expected to grow from USD 40.9 billion in 2023 to USD 109.2 billion by 2028 at a compound annual growth rate (CAGR) of 21.7% during the forecast period. Hyperscale computing is utilized in various scientific research, engineering simulations, and other high-performance computing tasks, where immense computational power and storage are essential. The massive number of IoT devices generates tremendous data that requires a robust computing infrastructure. Hyperscale computing can handle the influx of data from these devices and enable real-time processing and provide insights; such applications are fuelling the market growth of the hyperscale computing market.

Hyperscale computing is transforming the world by revolutionizing the way users access and utilize technology. Its immense scalability and cost-effectiveness have enabled the rapid expansion of cloud services, making computing power and storage accessible to businesses and individuals worldwide. As a result, hyperscale computing has fueled the growth of digital services, from online commerce and social media to advanced artificial intelligence applications. It has driven breakthroughs in medicine, climate research, and engineering simulations, accelerating scientific discoveries and innovation. Moreover, hyperscale data centers have become environmental pioneers, implementing energy-efficient practices to reduce their carbon footprint. As this technology continues to evolve, hyperscale computing promises to shape our interconnected world, driving progress and improving the lives of people across the globe.

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By vertical, the retail and consumer goods segment holds the highest CAGR during the forecast period.

The hyperscale computing market by vertical is divided into BFSI, IT and telecom, government and defense, research and academics, healthcare and life sciences, manufacturing, retail and consumer goods, media and entertainment, and other verticals. The retail and consumer goods segment is estimated to grow at the highest CAGR during the forecasted hyperscale computing market. Hyperscale computing plays a significant role in the retail & consumer goods industry, transforming various aspects of operations, customer experience, and supply chain management. Hyperscale computing enables retailers to handle large volumes of online transactions, support e-commerce platforms, and deliver seamless omnichannel experiences. It provides the computational power necessary for real-time inventory management, personalized recommendations, and efficient order processing, enhancing the overall customer experience. Secondly, hyperscale computing supports data-driven decision-making in the retail industry. It facilitates the processing and analysis of vast amounts of customer data, enabling retailers to gain insights into customer behavior, preferences, and trends. This helps optimize pricing strategies, product assortments, and marketing campaigns to meet consumer demands effectively.

Furthermore, hyperscale computing enhances supply chain management in retail. It enables real-time inventory tracking and analysis, demand forecasting, and supply chain optimization. This leads to improved inventory management, reduced costs, and streamlined logistics, ensuring products are efficiently delivered to customers. Additionally, hyperscale computing supports the implementation of emerging technologies in retail, such as augmented reality (AR), virtual reality (VR), and artificial intelligence (AI). It provides the computational resources to develop and deploy these technologies, enabling immersive shopping experiences, intelligent chatbots, and AI-driven customer service. Lastly, hyperscale computing enhances data security in the retail industry. It allows secure storage and management of customer information, payment data, and other sensitive data, ensuring compliance with data protection regulations and safeguarding customer privacy.

Based on region, the Europe region holds the second largest market share during the forecast period.

The hyperscale computing market, by region, is segmented into North America, Europe, Asia Pacific, the Middle East & Africa, and Latin America. The Europe region is expected to hold the second largest market share during the forecast period.

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Hyperscale computing plays a crucial and transformative role in the European region, significantly impacting the economy, technology landscape, and society. European businesses have increasingly embraced cloud computing due to the flexibility and scalability offered by hyperscalers. The cloud allows organizations to move away from legacy systems, optimize operations, and focus on core competencies. The ability to access vast computational resources on demand has also facilitated research and development efforts, particularly in scientific and academic fields. Furthermore, hyperscale cloud providers have established regional data centers, ensuring compliance with data protection regulations and reducing latency for local users. This strategic presence has encouraged more companies to migrate their data and applications to the cloud, enhancing business agility and continuity. In conclusion, hyperscale computing is expected to be the driving force behind Europe's digital transformation. Its vast computational power and storage capabilities have revolutionized industries, accelerated innovation, and is anticipated to reshape the digital economy. While data privacy, security, and environmental concerns remain critical, Europe's embrace of hyperscale computing is set to shape a more interconnected, data-driven future for the region.

Based on services, the training, support, and maintenance segment holds the largest market share during the forecast period.

The hyperscale computing market by services is segmented into consulting, integration and implementation, and training, support, and maintenance. The training, support, and maintenance segment is expected to hold the largest market share during the forecast period. The training, support, and maintenance services segment in the hyperscale computing market plays a crucial role in enabling organizations to operate and maintain their hyperscale infrastructure effectively. These services provide the necessary knowledge, assistance, and ongoing support to ensure smooth operation, optimize performance, and address any issues that may arise. Training services equip organizations with the skills and knowledge to effectively manage and utilize the hyperscale infrastructure. They offer training programs, workshops, and educational resources to train administrators, IT staff, and other personnel on hyperscale computing, including hardware management, software configuration, network administration, and troubleshooting. Support services are essential for organizations to receive timely assistance and resolve technical issues. Service providers offer help desk support, ticketing systems, and dedicated support teams to address hardware or software failures, network issues, and other operational challenges. They provide troubleshooting guidance, resolve problems, and ensure minimal downtime and disruptions. Maintenance services involve proactive monitoring, preventive

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maintenance, and regular updates to keep the hyperscale infrastructure running smoothly. Service providers assist with hardware repairs or replacements, software updates, security patches, and overall infrastructure health checks. These services help organizations maximize system uptime, performance, and security.

Breakdown of primaries

In-depth interviews were conducted with Chief Executive Officers (CEOs), innovation and technology directors, system integrators, and executives from various key organizations operating in the hyperscale computing market.

By Company: Tier I: 38%, Tier II: 42%, and Tier III: 20%

By Designation: C-Level Executives: 40%, Director Level: 35%, and Others: 25%

By Region: North America: 35%, Europe: 40%, Asia Pacific: 15%, Rest of World: 10%

Some of the significant hyperscale computing market vendors are AWS (US), Google (US), Microsoft Corporation (US), IBM Corporation (US), Oracle Corporation (US), HPE (US), Alibaba Cloud (China), Tencent Cloud (China), Salesforce (US), Huawei (China), Viavi Solutions (US), Broadcom (US), AFL Hyperscale (US), OVHcloud (France), Iron Mountain (US), DigitalOcean (US), Rackspace (US), NTT Communications (Japan), and Digital Reality (US).

Research coverage:

The market study covers the hyperscale computing market across segments. It aims at estimating the market size and the growth potential across different segments, such as offerings, applications, verticals, and regions. It includes an in-depth competitive analysis of the key players in the market, their company profiles, key observations related to product and business offerings, recent developments, and key market strategies.

Reasons to buy this report:

The report will help the market leaders/new entrants with information on the closest

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approximations of the revenue numbers for the overall hyperscale computing market and the subsegments. This report will help stakeholders understand the competitive landscape and gain more insights to position their businesses better and plan suitable go-to-market strategies. The report also helps stakeholders understand the market pulse and provides information on key market drivers, restraints, challenges, and opportunities.

The report provides insights on the following pointers:

Analysis of key drivers (Rising need for high-performance technology and cloud computing, High adoption of hyperscale computing in different industries boosts the market growth, Growing need for reduction in CAPEX and OPEX), restraints (Higher capital expenditure costs, and lack of data control, Fear of vendor lock-in), opportunities (Hyperscale data centers will become a new paradigm for delivering IT services, Rise in modular UPS systems), and challenges (Storage challenge for hyperscale computing, Various standard requirements, Carbon emissions by hyperscale data centers) influencing the growth of the hyperscale computing market.

Product Development/Innovation: Detailed insights on upcoming technologies, research & development activities, and new product & service launches in the hyperscale computing market.

Market Development: Comprehensive information about lucrative markets – the report analyses the hyperscale computing market across varied regions.

Market Diversification: Exhaustive information about new products & services, untapped geographies, recent developments, and investments in the hyperscale computing market.

Competitive Assessment: In-depth assessment of market shares, growth strategies, and service offerings of leading players, including AWS (US), Google (US), Microsoft Corporation (US), IBM Corporation (US), and Oracle Corporation (US), among others in the hyperscale computing market.

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