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Hyperscale Data Center Market by Power Capacity (10-50 MW, 50-100 MW, Above 101 MW), IT Infrastructure (Server, Storage, Network), Electrical Infrastructure (PDUs, UPS Systems), Mechanical Infrastructure (Cooling Systems, Rack) - Global Forecast to 2030

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Abstracts

The global hyperscale data center market will grow from USD 162.79 billion in 2024 to USD 608.54 billion by 2030 at a compounded annual growth rate (CAGR) of 24.6% during the forecast period. Enterprises' growing adoption of cloud computing will exacerbate the demand for hyperscale data centers as companies increasingly count on cloud platforms for their extensive scaling, flexibility, and cost-efficiency needs. Hyperscale data centers are built to handle massive workloads and provide all the infrastructure required to support AWS, Microsoft Azure, and Google Cloud cloud services.

Hyperscale requires advanced technologies, high-performance computing resources, and seamless scalability. As hybrid and multi-cloud strategies shape, hyperscale data centers add considerable value in operating the underlying integration and data management. The shift into cloud-native applications, big-data analytics, and remote work will likely continue to inject the increasing need for hyperscale infrastructure when guaranteeing reliable and scalable cloud services.

'Based on component, the software segment is expected to grow at the highest CAGR during the forecast period.'

Software is expected to be in high demand for the hyperscale data center market during

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the forecast period due to the hyperscaling of hyperscale data centers, increasing the demand for automation, efficiency, and scalability. Software solutions such as management platforms, virtualization tools, and AI-driven analytics are critical to optimizing those Data Centers' operations and reducing downtime. These tools support real-time monitoring, predictive maintenance, and seamless cloud/on-premises integration and are vital to this environment. Its developing use cases and adoption of advanced workloads in enterprises, including AI, machine learning, and big data analytics, demand high-performance, sophisticated software for resource and efficient management. Furthermore, the trend toward software-defined data centers is accelerating investments in this segment, as it offers flexibility and cost savings by decoupling hardware from software, paving the way for rapid growth in this market.

'Based on power capacity, the 10-50 MW segment holds the largest share during the forecast period.'

The 10-50 MW capacity segment is expected to hold the highest market share during the hyperscale data center market forecast period because it balances scalability with operational efficiency. It meets the growing demand in cloud computing, artificial intelligence, and big data analytics, which require significant power consumption and high computational resources. Major cloud providers and enterprises widely adopt data centers that fall within this category for a decent capacity to host high-density workloads with further expandability. The 10-50 MW category is favored for its flexibility, enabling organizations to operate large-scale operations without overcommitting to high power capacities. Moreover, innovations in energy-efficient technologies and modular designs in this space make it the most cost-effective option that resonates with the sustainability agenda. Investment in digital infrastructure and increasing deployment of hybrid cloud is also likely to see growth in the 10-50 MW band as a cornerstone for the hyperscale data center market.

'Based on the end users, the colocation providers segment is expected to grow at the highest CAGR during the forecast period.'

In the hyperscale data center market, the colocation provider segment is projected to experience the highest compound annual growth rate (CAGR) during the forecast period. The growing demand of businesses for scalable and cost-effective solutions to their data storage and processing needs fuels this growth. They allow companies to spread operations to increase data centers by offering infrastructure, power, cooling, and connectivity at a minimal investment. Increasing consumption of cloud services, edge computing, and workloads related to AI will contribute to growing demands for

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colocation facilities as their delivery brings needed flexibility and proximity to end-users. Additionally, enterprises increasingly choose colocation to meet sustainability goals, as providers often deploy energy-efficient technologies and renewable energy sources. With hyperscale operators partnering with colocation providers to support growing data requirements, this segment is set to lead the market's growth trajectory.

Breakdown of primaries

We interviewed Chief Executive Officers (CEOs), directors of innovation and technology, system integrators, and executives from several significant hyperscale data center market companies.

By Company: Tier I: 40%, Tier II: 25%, and Tier III: 35%

By Designation: Directors: 37%, Managers: 25%, and Others: 38%

By Region: North America: 38%, Europe: 24%, Asia Pacific: 22%, Rest of World: 16%

Some significant hyperscale data center market vendors are AWS, Google, Microsoft, Oracle, IBM, HPE, Arista Network, Dell, Tencent, and Alibaba.

Research coverage:

The market report covered the hyperscale data center market across segments. We estimated the market size and growth potential for many segments based on component, deployment type, power capacity, end user, and region. It contains a thorough competition analysis of the major market participants, information about their businesses, essential observations about their product and service offerings, current trends, and critical market strategies.

Reasons to buy this report:

With information on the most accurate revenue estimates for the whole hyperscale data center industry and its subsegments, the research will benefit market leaders and recent newcomers. Stakeholders will benefit from this report's increased understanding of the competitive environment, which will help them better position their companies and develop go-to-market strategies. The research offers information on the main market

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drivers, constraints, opportunities, and challenges, as well as aids players in understanding the pulse of the industry.

The report provides insights on the following pointers:

Analysis of key drivers (digital transformation initiatives, the surge in adoption of multi-cloud, disaster recovery and business continuity, increasing hyperscale data center spending), restraints (shortage of skilled workforce), opportunities (expansion of 5G infrastructure, deployment of AI and advanced computing, surge in data traffic, data localization and sovereignty requirement), and challenges (latency & connectivity limitation in remote areas, integration of legacy system with modern infrastructure) influencing the growth of the hyperscale data center market.

Product Development/Innovation: Comprehensive analysis of emerging technologies, R&D initiatives, and new service and product introductions in the hyperscale data center market.

Market Development: In-depth details regarding profitable markets: the paper examines the global hyperscale data center market.

Market Diversification: Comprehensive details regarding recent advancements, investments, unexplored regions, new goods and services, and the hyperscale data center market.

Competitive Assessment: Thorough analysis of the market shares, expansion plans, and service portfolios of the top competitors in the hyperscale data center industry, such as AWS (US), Google (US), Microsoft (US), Oracle (US), and IBM (US).

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