

In-Memory Computing Market by Component (Solutions & Services), Solution (IMDB (OLTP & OLAP), IMDG, and Data Stream Processing), Service, Application (Risk Management & Fraud Detection, Predictive Analysis), Vertical, and Region - Global Forecast to 2025

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Abstracts

The global IMC market size is expected to grow from USD 11.4 billion in 2020 to USD 24.5 billion by 2025, at a Compound Annual Growth Rate (CAGR) of 16.5% during the forecast period. In-Memory Computing (IMC) is a type of middleware software that enables users to store data in RAM, across a cluster of computers, and process it in parallel. It primarily relies on keeping data in servers' RAM for processing it at faster speeds. It especially relates to processing problems that require extensive access to data analytics, reporting, or warehousing and big data applications. The explosion of big data has prompted much research to develop systems to support ultra-low latency services and real-time data analytics. IMC offers one or multiple strategies for in-memory backups, durable storage backups, and disk-based swap space overflow to end users. It provides a comprehensive tiered storage approach, wherein users can decide what portion of the overall data set is stored in RAM and is a local disk swap space.

COVID-19 is disrupting the world, businesses, and economies, thus impacting the livelihood of people, their interaction, and the way they manage their businesses. The ability to sustain is becoming the new normal for enterprises as they are shifting their focus from growth opportunities to the implementation of drastic measures for mitigating the impact of the COVID-19 pandemic. The competition among major IMC companies is expected to be furious as most upcoming AI and analytics projects are kept on hold due

to the pandemic. Hence, several companies would fight to gain a single project. Businesses are trying to return back to normal and facing multiple challenges on the customer as well as operational side. Meeting customer expectations in terms of optimizing processes, increasing security concerns due to various voice-related recording systems and networks, growing network connectivity issues, and declining industrial and manufacturing operations are some of the key business challenges. New practices such as work from home and social distancing are creating the need for remote monitoring, smart payment technologies, and building digital infrastructure for large-scale deployments. With a sudden surge in remote workers, there is an increase in the demand for advanced IMC-based solutions and services to effectively store and safeguard a huge amount of data. For instance, Netflix has witnessed nearly 16 million new users, a huge surge, in media streaming in the last quarter of 2020.

Among Solutions, the IMDB segment to record the highest growth during the forecast period

By solution, the IMDB segment is expected to account for a higher market share during the forecast period. The highest market share of the IMDB segment is attributed to the increasing demand for boosting performance and scalability, and building real-time applications, which are the major factors for the fast growth of the IMC market across the globe. IMDB solutions also help reduce development and operational costs through standardization on an IMC system. IMC solutions comprise In-Memory Data Grid (IMDG), In-Memory Database (IMDB), and Streaming Data Analysis. These solutions are a type of middleware software that enables businesses to store data in RAM, across a cluster of computers, and process it in parallel. Most of these solutions offered are claimed to be easy to deploy and are feature-rich to address complex computing rigors and requirements. IMC solutions are designed from the ground up to store data in a distributed fashion, where the entire dataset is divided into individual computers' memory, each storing only a portion of the overall dataset. Once data is partitioned, parallel distributed processing becomes a technical necessity because data is stored in a partitioned way.

Among services, the managed services segment to record the higher CAGR during the forecast period

The services segment in the IMC market has been further divided into professional services and managed services. These services play a vital role in the functioning of IMC solutions. IMC vendors require technical support services and consulting services to quickly and smoothly deploy their solutions in the market. These services help

maximize the value of enterprise investments. Service providers ensure end-to-end deployment and maintenance of IMC solutions and address pre- and post-deployment queries.

Among applications, the predictive analysis segment to record the higher CAGR during the forecast period

IMC solutions have emerged as an important requirement for enterprises to conduct the accurate analysis of data stored in the RAM of servers and storage. Even enterprises with limited financial resources and IT expertise have started implementing IMC-enabled applications to help non-technical users to quickly perform complex data analysis. IMC product capabilities are integrated with diverse business applications scattered through different verticals and designed to replenish the unique demands of business segments. Apart from established players in the IMC industry, the new entrants in the market are introducing new solutions to lure customers. The market players are focusing on meeting the demands of customers with unique product features. The report segments the overall IMC market by the following business applications: risk management and fraud detection, sentiment analysis, geospatial/GIS processing, sales and marketing optimization, predictive analysis, supply chain management, and others (image processing, route optimization, claim processing and modelling, and trade promotion simulations).

Among deployment mode, the cloud deployment segment to record the higher CAGR during the forecast period

The IMC market by deployment mode includes the on-premises and cloud segments. Deployment refers to the setting-up of the hardware, operating systems, and applications required to manage the IT ecosystem. IMC solutions can be deployed through either mode based on security, availability, and scalability. Cloud deployment offers advantages such as pay-per-use, and low installation and maintenance costs. This deployment mode is expected to show high growth in the near future.

Among organization size, the SME's segment to record the higher CAGR during the forecast period

IMC is widely being used across major verticals. Its adoption is increasing, irrespective of organization size. Based on organization size, the IMC market is segmented into SMEs and large enterprises. Organizations are categorized among these two types based on their employee strength. SMEs have realized the necessity to structure large

volumes of data, which increases with time. The adoption of IMC solutions and services is expected to be high among SMEs due to the availability of low-cost cloud deployment options. The ever-growing volume of data due to the use of social media, mobile applications, and entertainment devices is one of the major factors increasing the adoption of IMC solutions and services among SMEs and large enterprises.

Among verticals, the healthcare and life sciences vertical to record the higher CAGR during the forecast period

IMC is gaining traction across verticals, owing to the proliferation of data and demand for operational efficiency by organizations. Enterprises are harnessing the value of IMC as it promises to facilitate business users with the in-memory processing of data, enabling swift decision-making through faster business insights. The market is segmented by vertical which includes BFSI, retail and eCommerce, government and defense, healthcare and life sciences, transportation and logistics, IT and telecom, energy and utilities, media and entertainment, and others. The others vertical comprises education, manufacturing, and travel and hospitality. The BFSI vertical is the major revenue contributor to the IMC market due to the early adoption of IMC solutions in the vertical.

Among regions, North America to hold the largest market size during the forecast period

North America is expected to hold the largest market size in the global IMC market during the forecast period. The key factor favoring the growth of the IMC market in North America is the increasing demand for analytics and advanced analytics platforms by small and medium businesses and government agencies would fuel the demand for IMC products in North America. Europe is expected to be in second position in terms of market size and market share during the forecast period. ? The rising adoption of cloud and IoT, and increasing use of the web are some of the factors driving the IMC market growth in Europe. APAC is expected to record the fastest growth rate during the forecast period. The IMC market is expected to witness considerable developments and adoption of solutions across APAC during the forecast period. The increasing number of players across different regions is further expected to drive the IMC market.

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 IMC market.

By Company: Tier I: 34%, Tier II: 43%, and Tier III: 23%

By Designation: C-Level Executives: 50%, Directors: 30%, & Other level: 20%

By Region: North America: 30%, APAC: 25%, Europe: 30%, Latin America: 10%, Middle East and Africa: 5%

The report includes the study of key players offering IMC solutions and services. It profiles major vendors in the global IMC market. The major vendors in the global IMC market include Microsoft (US), Oracle (US), SAP (Germany), IBM (US), SAS Institute (US), TIBCO (US), Software AG (Germany), Fujitsu (Japan), Red Hat (US), Altibase (US), GigaSpaces (US), GridGain (US), Hazelcast (US), MongoDB (US), Exasol (Germany), Intel (Germany), Qlik (US), Salesforce (US), Workday (US), Teradata (US), Kognitio (UK), Enea (Sweden), VoltDB (US), McObject (US), and MemSQL (US).

Research Coverage

The IMC market is segmented by component, application, deployment mode, organization size, vertical, and region. A detailed analysis of the key industry players has been undertaken to provide insights into their business overviews; services; key strategies; new service launches; partnerships, agreements, and collaborations; business expansions; and competitive landscape associated with the global IMC market.

Key Benefits of Buying the Report

The report would help the market leaders/new entrants in the following ways:

It comprehensively segments the IMC market and provides the closest approximations of the revenue numbers for the overall market and its subsegments across regions.

It would help stakeholders understand the pulse of the market and provide information on the key market drivers, restraints, challenges, and opportunities.

It would help stakeholders understand their competitors better and gain more insights to enhance their positions in the market. The competitive landscape section includes a competitor ecosystem, new service developments,

partnerships, and acquisitions.

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*Details on Business overview, Solutions and services offered, Recent developments, MNM view, Key strengths/right to win, Strategic choices made, and Weaknesses and competitive threats might not be captured in case of unlisted companies.

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