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Modular Data Center Market by Solutions (All-in-one and Prefabricated Modules (IT, Power, Cooling)), Form Factor (ISO Containers (20 feet, 40 feet), Enclosures, Skid-mounted), Build Type (Semi & Fully-prefabricated) - Global Forecast to 2030

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Abstracts

The modular data center market is expected to grow from USD 29.93 billion in 2024 to USD 79.49 billion by 2030 at a Compound Annual Growth Rate (CAGR) of 17.7% during the forecast period. The modular data center market is expected to see significant growth as organizations increasingly seek scalable and flexible infrastructure solutions. Modular data centers offer rapid deployment, reduced construction time, and efficient energy usage, which are essential as IT demands continue to evolve. Key advancements like modular power and cooling systems, prefabricated IT modules, and enhanced automation are transforming how data centers are designed and deployed. These pre-configured, pre-tested modules minimize on-site work, allowing for faster installation and upgrades. This streamlined approach ensures that businesses can quickly adapt to changing infrastructure needs while optimizing performance and cost-efficiency.

'As per component, services will grow at the highest CAGR during the forecast period.'

Within the modular data center market, services play a vital role in ensuring the seamless functioning and optimization of these facilities. The services are divided into three main categories: design & consulting, integration & deployment, and support & maintenance. Design & consulting services focus on customizing data center solutions according to specific business needs, ensuring optimal space, power, and cooling configurations. Integration & deployment services involve the assembly and installation of modular units, ensuring a swift and smooth setup with minimal disruption to existing

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operations. Support & maintenance services provide ongoing care, including regular monitoring, troubleshooting, and preventive maintenance to ensure high performance and minimize downtime. Together, these services help organizations rapidly deploy, scale, and maintain their modular data centers while reducing operational complexities and costs. Whether it's a new installation or upgrading an existing infrastructure, these services enable companies to keep up with evolving technological requirements and ensure the reliability of their data center operations.

'As per solutions segment, prefabricated modules will hold the largest share during the forecast period.'

Prefabricated modules in the modular data center market offer a versatile approach by providing pre-engineered and pre-assembled components that can be quickly deployed on-site. These modules are further categorized into prefabricated IT modules, prefabricated power modules, and prefabricated cooling modules, each addressing specific requirements for data center infrastructure. The modular nature enables companies to expand or upgrade their data centers seamlessly, reducing construction time and costs associated with traditional builds. Prefabricated modules are especially beneficial for industries with fluctuating demands, such as finance, healthcare, and cloud service providers, where rapid scalability and reliability are crucial. They allow for a standardized design while offering flexibility in configuration, making them suitable for diverse environments, from large data centers to remote locations. Moreover, these modules contribute to energy efficiency by optimizing power and cooling distribution, helping companies achieve their sustainability targets. As data center demands evolve, the adoption of prefabricated modules is growing, providing a practical and cost-effective solution for modernizing infrastructure and meeting the dynamic needs of the digital age.

'As per data center size, the small data center will grow with the highest CAGR during the forecast period.'

Small data centers are a vital sub-segment of the modular data center market, designed to meet the growing demand for localized computing power while optimizing space and energy usage. Typically ranging from 100 to 1,000 square feet, these compact facilities can be deployed quickly and scaled as needed, allowing organizations to respond swiftly to evolving requirements. A key advantage is their proximity to end-users, reducing latency and enhancing performance for applications like edge computing. Equipped with advanced cooling solutions, such as in-row cooling and hot aisle/cold aisle containment, small data centers improve energy efficiency and lower operational

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costs. They often feature energy-efficient equipment, including modular UPS systems and high-density servers, maximizing performance while minimizing the carbon footprint. As data processing demands increase from IoT devices and mobile applications, small data centers provide a flexible, cost-effective solution that supports diverse industry needs, from telecommunications to healthcare. Their ability to adapt and optimize resources ensures their relevance in today's rapidly evolving digital landscape.

The breakup of the profiles of the primary participants is below:

By Company: Tier I: 30%, Tier II: 45%, and Tier III: 25%

By Designation: C-Level Executives: 50%, Director Level: 35%, and Others: 15%

By Region: North America: 50%, Europe: 30%, Asia Pacific: 15%, Rest of World: 5%

Note: Others include sales managers, marketing managers, and product managers

Note: The rest of the World consists of the Middle East & Africa, and Latin America

Note: Tier 1 companies have revenues of more than USD 100 million; tier 2 companies' revenue ranges from USD 10 million to USD 100 million; and tier 3 companies' revenue is less than 10 million

Source: Secondary Literature, Expert Interviews, and MarketsandMarkets Analysis

Major companies offering modular data center solutions and services are Dell (US), Schneider Electric (France), Vertiv (US), Johnson Controls (US), Eaton (US), Delta Electronics (Taiwan), Huawei (China), ABB (Switzerland), Stulz (Germany), Rittal (Germany), Hubbell (PCX) (US).

Research coverage:

In this study, an in-depth analysis of the modular data center market is done based on market trends, potential growth during 2019, and a forecast up to 2024-2030. Further, it gives detailed market trends, a competitive landscape, market size, forecasts, and key

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players' analysis of the the modular data center market. This market study analyzes the growth rate and penetration of modular data center across all the major regions.

Reasons to buy this report:

The report will aid the market leaders/new entrants in the following: Details regarding the closest approximations of the revenue numbers for the modular data center market and its subsegments. This study will aid the stakeholders in understanding the competitive landscape; it gives more insights to position their businesses better and plan suitable go-to-market strategies. It also helps the 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 critical drivers (rising adoption of cloud computing and services, scalability, disaster recovery benefits, and the growth in edge computing deployments), restraints (high initial capital expenditure), opportunities (rapid scalability and disaster recovery benefits), and challenges (scalability in large data centers, limited customization for specialized needs, and increased maintenance complexity) influencing the growth of the modular data center market.

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

Market Development: In-depth understanding of upcoming technologies, research & development efforts, and new product & service releases in the modular data center market.

Market Diversification: Comprehensive details on the latest products & services, unexplored regions, recent advancements, and investments in the modular data center market.

Competitive Assessment: In-depth assessment of market shares, growth strategies, and Dell (US), Schneider Electric (France), Vertiv (US), Johnson Controls (US), Eaton (US), Delta Electronics (Taiwan), Huawei (China), ABB (Switzerland), Stulz (Germany), Rittal (Germany), Hubbell (PCX) (US), among

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others in the modular data center market.

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