

Modular Data Center Market by Component (Solutions and Services), Organization Size (Large Enterprises and SMEs), Vertical (BFSI, IT & Telecom, Healthcare, Retail, Media & Entertainment, and Manufacturing) and Region - Global Forecast to 2030

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Abstracts

The Modular data center market size is expected to grow from USD 25.8 billion in 2023 to USD 81.2 billion by 2030 at a Compound Annual Growth Rate (CAGR) of 17.8% during the forecast period. The market has excellent growth opportunities, such as deployment in disaster-prone areas, demand from colocation providers, and demand for data centers in space and underwater.

“By component, the solutions segment to have a higher market share during the forecast period.”

The requirement for flexible cabinets to hold this equipment will only grow as more businesses construct their data centers to exact performance and cost goals. The growing data needs of end users are beyond the capabilities of the current IT infrastructure. Adaptable and adequate infrastructure is desperately needed to meet the performance requirements of modern data centers. Managers can store, cool, power, manage, and secure essential IT equipment with modular data centers and enclosures. Major market vendors offer data centers of different sizes and provide features like cable and airflow management accessories to support enterprise and data center requirements.

“By solutions, the all-in-one modules segment is expected to grow at a higher CAGR during the forecast period. “

The all-in-one module is a highly integrated containerized data center facility for enterprise data management, oil exploration, and disaster relief. It is a temporary module usually implemented in cases wherein data center mobility is a concern, as it comprises modules with cooling, power, and IT systems built inside a single container. These containerized modules are portable and energy-efficient and provide on-site, ready-to-deploy solutions, reducing installation costs and time. They also enable scalability and flexibility to the IT infrastructure to adjust to the design and size for future deployments. This advantage of the all-in-one module, wherein organizations can implement scale-out infrastructure, is expected to fuel the market for modular data centers. Modular data centers provide exceptional value for organizations looking to implement an edge computing strategy by combining power, cooling, and IT infrastructure into a single solution.

“By vertical, the BFSI segment is projected to record the highest market share during the forecast period.”

The BFSI industry is rapidly adopting electronic banking, paperless storage, and virtualization, which has increased the demand for safe, resilient, cost-effective, and energy-efficient modular data center solutions. As the BFSI industry deals with vast amounts of customers' data regularly, it requires reliable IT equipment to store and manage it. Reliable data centers must offer uninterrupted financial services and improve the response time for running end-user applications. Modular data centers provide high computing power, reduce computational time for BFSI institutions, and ensure business continuity by focusing on management, scalability, efficiency, and energy efficiency. Therefore, modular data center solutions are essential in minimizing business continuity risk and providing cost-effective solutions in the BFSI sector.

“The Asia Pacific is expected to have the highest growth during the forecast period.”

The Modular Data Center market in the Asia Pacific region is poised for significant growth during the forecast period, driven by several key factors. As the demand for data storage and processing capabilities continues to soar across IT, healthcare, finance, and telecommunications industries, the need for flexible and scalable data center solutions becomes increasingly crucial. Modular data centers offer a compelling solution by providing a modular and easily expandable infrastructure that can be deployed quickly to meet evolving business requirements. In the Asia Pacific, where rapid urbanization and digital transformation are driving the need for efficient and resilient data management, modular data centers offer a strategic advantage. Additionally, the region's diverse climate conditions necessitate adaptable and energy-efficient

solutions, further emphasizing the appeal of modular data centers. With the escalating adoption of cloud services, IoT, and big data analytics, the demand for modular data centers is expected to surge, making the Asia Pacific market a hotspot for growth in the foreseeable future.

“North America to hold the largest share in the global Modular Data Center market.”

The Modular Data Center market in North America is a dominant force in the global landscape, and various factors underpin its sustained growth. The region's robust technological infrastructure and a thriving ecosystem of tech-driven industries have fueled an insatiable demand for scalable and adaptable data solutions. As businesses across sectors continue to embrace digital transformation, the need for modular data centers has surged due to their ability to provide rapid deployment, flexibility, and cost-effectiveness. North America's leadership in cloud computing, artificial intelligence, and other data-intensive technologies has further driven the demand for modular data centers, positioning the region at market dominance. Moreover, the region's stringent regulatory environment and a heightened focus on sustainability have prompted organizations to adopt modular data centers, which often boast energy-efficient designs. The combination of technological prowess, business agility, and environmental considerations cements North America's position as a critical player in the Modular Data Center market, with continued dominance expected in the foreseeable future.

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

By Company Type: 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%, **RoW: 5%

* Others include sales managers, marketing managers, and product managers

**RoW include 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

Some of the key players operating in the modular data center market are – Dell Technologies (US), Vertiv (US), Schneider Electric (France), IBM (US), Huawei (China), Eaton (Ireland), Rittal (Germany), HPE (US), Silent-Aire (Canada), and Eltek (Norway).

Research coverage:

The market study covers the Modular data center market across segments. It aims to estimate the market size and the growth potential across different segments such as component, organization size, vertical, and region. 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 approximations of the revenue numbers for the overall Modular Data Center 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, restraints, opportunities, and challenges 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: Comprehensive information about lucrative markets – the report analyses the modular data center market across varied regions.

Market Diversification: Exhaustive information about new products & services,

untapped geographies, recent developments, and investments in the modular data center market.

Competitive Assessment: In-depth assessment of market shares, growth strategies, and service offerings of leading players like Dell Technologies, Vertiv, Schneider Electric, IBM, and Huawei in the modular data center market.

Contents

1 INTRODUCTION

1.1 STUDY OBJECTIVES

1.2 MARKET DEFINITION

1.2.1 INCLUSIONS AND EXCLUSIONS

1.3 MARKET SCOPE

1.3.1 MARKET SEGMENTATION

1.3.2 REGIONS COVERED

1.4 YEARS CONSIDERED

1.5 CURRENCY CONSIDERED

TABLE 1 USD EXCHANGE RATES, 2018–2022

1.6 STAKEHOLDERS

1.7 SUMMARY OF CHANGES

1.7.1 RECESSION IMPACT

2 RESEARCH METHODOLOGY

2.1 RESEARCH DATA

FIGURE 1 MODULAR DATA CENTER MARKET: RESEARCH DESIGN

2.1.1 SECONDARY DATA

2.1.2 PRIMARY DATA

2.1.2.1 Breakup of primary profiles

2.1.2.2 Key industry insights

2.2 DATA TRIANGULATION

FIGURE 2 MODULAR DATA CENTER MARKET: DATA TRIANGULATION

2.3 MARKET SIZE ESTIMATION

FIGURE 3 MODULAR DATA CENTER MARKET: TOP-DOWN AND BOTTOM-UP APPROACHES

2.3.1 TOP-DOWN APPROACH

FIGURE 4 MARKET SIZE ESTIMATION METHODOLOGY: APPROACH 1 (TOP-DOWN), REVENUE GENERATION FROM MODULAR DATA CENTER VENDORS

2.3.2 BOTTOM-UP APPROACH

FIGURE 5 MARKET SIZE ESTIMATION METHODOLOGY: APPROACH 2 (BOTTOM-UP)

FIGURE 6 MARKET SIZE ESTIMATION METHODOLOGY: BOTTOM-UP APPROACH FROM SUPPLY SIDE - COLLECTIVE REVENUE OF VENDORS

FIGURE 7 ILLUSTRATIVE EXAMPLE OF REVENUE ESTIMATION

FIGURE 8 MARKET SIZE ESTIMATION METHODOLOGY: CAGR PROJECTIONS
FROM SUPPLY SIDE

FIGURE 9 MODULAR DATA CENTER MARKET: RESEARCH FLOW

2.4 MARKET FORECAST

TABLE 2 FACTOR ANALYSIS

2.5 IMPACT OF RECESSION ON GLOBAL MODULAR DATA CENTER MARKET

2.6 RESEARCH ASSUMPTIONS

2.7 LIMITATIONS AND RISK ASSESSMENT

3 EXECUTIVE SUMMARY

3.1 OVERVIEW OF RECESSION IMPACT

FIGURE 10 RECESSION OUTLOOK, 2017–2030 (USD MILLION)

FIGURE 11 TOP-GROWING SEGMENTS IN MODULAR DATA CENTER MARKET

FIGURE 12 MODULAR DATA CENTER MARKET: REGIONAL SNAPSHOT

4 PREMIUM INSIGHTS

4.1 ATTRACTIVE GROWTH OPPORTUNITIES IN MODULAR DATA CENTER
MARKET

FIGURE 13 FOCUS ON REDUCING TIME TO MARKET, LATENCY, EASY
SCALABILITY, AND CONVENIENT DEPLOYMENT TO DRIVE ADOPTION OF
MODULAR DATA CENTER SOLUTIONS & SERVICES

4.2 MODULAR DATA CENTER MARKET, BY COMPONENT, 2023 VS. 2030

FIGURE 14 SOLUTIONS SEGMENT TO ACCOUNT FOR LARGER MARKET SHARE
DURING FORECAST PERIOD

4.3 MODULAR DATA CENTER MARKET, BY SOLUTION, 2023 VS. 2030

FIGURE 15 INDIVIDUAL MODULES SEGMENT TO HOLD LARGER MARKET SHARE
DURING FORECAST PERIOD

4.4 MODULAR DATA CENTER MARKET, BY SERVICE, 2023 VS. 2030

FIGURE 16 SUPPORT & MAINTENANCE SEGMENT TO HOLD LARGEST MARKET
SHARE DURING FORECAST PERIOD

4.5 MODULAR DATA CENTER MARKET, BY ORGANIZATION SIZE, 2023 VS. 2030

FIGURE 17 LARGE ENTERPRISES SEGMENT TO HOLD LARGER MARKET SHARE
DURING FORECAST PERIOD

4.6 MODULAR DATA CENTER MARKET, BY VERTICAL, 2023 VS. 2030

FIGURE 18 BFSI SEGMENT TO HOLD LARGEST MARKET SHARE DURING
FORECAST PERIOD

4.7 MODULAR DATA CENTER MARKET: REGIONAL SCENARIO, 2023–2030

FIGURE 19 ASIA PACIFIC TO EMERGE AS BEST MARKET FOR INVESTMENTS IN NEXT SEVEN YEARS

5 MARKET OVERVIEW AND INDUSTRY TRENDS

5.1 MARKET DYNAMICS

FIGURE 20 DRIVERS, RESTRAINTS, OPPORTUNITIES, AND CHALLENGES:
MODULAR DATA CENTER MARKET

5.1.1 DRIVERS

5.1.1.1 Increased demand for rapidly scalable and deployable data centers

FIGURE 21 CONSTRUCTION TIMELINE OF MODULAR AND TRADITIONAL DATA CENTERS

5.1.1.2 Growing need for energy-efficient data centers

5.1.1.3 Easy implementation of redundant data centers

5.1.1.4 Easy compliance in modular data centers

5.1.1.5 Proliferation of data center colocation facilities globally

5.1.1.6 Data center optimization initiatives to address critical infrastructure inefficiencies

5.1.2 RESTRAINTS

5.1.2.1 Transportation of modular data centers

TABLE 3 ROADWAY TRANSPORTATION WEIGHT AND SIZE LIMITS

5.1.2.2 Vendor lock-ins to limit buying options

5.1.2.3 Emergence of HCI

5.1.3 OPPORTUNITIES

5.1.3.1 Deployment in disaster-prone areas

TABLE 4 NEMA ENCLOSURE RATINGS

5.1.3.2 Demand from colocation providers for modular data centers

5.1.3.3 Demand for data centers on the Moon

5.1.3.4 Demand for underwater data centers

5.1.3.5 Demand for data centers in space

5.1.3.6 Establishment of data centers in Iceland

5.1.4 CHALLENGES

5.1.4.1 Implementing effective cooling systems

TABLE 5 AMERICAN SOCIETY OF HEATING, REFRIGERATION, AND AIR CONDITIONING ENGINEERS THERMAL GUIDELINE VALUES

5.1.4.2 Reliance on PUE as sole efficiency measure

5.2 PORTER'S FIVE FORCES ANALYSIS

FIGURE 22 MODULAR DATA CENTER MARKET: PORTER'S FIVE FORCES ANALYSIS

TABLE 6 MODULAR DATA CENTER MARKET: PORTER'S FIVE FORCES ANALYSIS

5.2.1 THREAT OF NEW ENTRANTS

5.2.2 THREAT OF SUBSTITUTES

5.2.3 BARGAINING POWER OF SUPPLIERS

5.2.4 BARGAINING POWER OF BUYERS

5.2.5 INTENSITY OF COMPETITIVE RIVALRY

5.3 KEY STAKEHOLDERS & BUYING CRITERIA

5.3.1 KEY STAKEHOLDERS IN BUYING PROCESS

FIGURE 23 INFLUENCE OF STAKEHOLDERS ON BUYING PROCESS FOR TOP END USERS

TABLE 7 INFLUENCE OF STAKEHOLDERS ON BUYING PROCESS FOR TOP END USERS (%)

5.3.2 BUYING CRITERIA

FIGURE 24 KEY BUYING CRITERIA FOR TOP END USERS

TABLE 8 KEY BUYING CRITERIA FOR TOP END USERS

5.4 MODULAR DATA CENTER: ADOPTION TREND BY CLOUD PROVIDERS

TABLE 9 LIST OF MAJOR CLOUD PROVIDERS

5.5 TREND ANALYSIS: MODULAR DATA CENTER PROVIDERS AND OPERATORS

5.5.1 INSIGHTS ON KEY DATA CENTER MANUFACTURERS

5.5.2 INSIGHTS ON KEY DATA CENTER OPERATORS

5.6 VALUE CHAIN

FIGURE 25 MODULAR DATA CENTER MARKET: VALUE CHAIN

5.7 ECOSYSTEM

FIGURE 26 MODULAR DATA CENTER MARKET: ECOSYSTEM

TABLE 10 MODULAR DATA CENTER MARKET: COMPANIES AND THEIR ROLE IN ECOSYSTEM

5.8 TECHNOLOGICAL ANALYSIS

5.8.1 KEY TECHNOLOGIES

5.8.1.1 Cybersecurity

5.8.1.2 Server Virtualization

5.8.1.3 Edge Computing

5.8.2 COMPLEMENTARY TECHNOLOGIES

5.8.2.1 AI/ML

5.8.2.2 IoT

5.8.2.3 5G

5.8.3 ADJACENT TECHNOLOGIES

5.8.3.1 Cloud Computing

5.8.3.2 Hyperscale

5.9 PRICING ANALYSIS

5.9.1 AVERAGE SELLING PRICE (ASP) TREND OF KEY PLAYERS, BY SOLUTION
FIGURE 27 AVERAGE SELLING PRICE TREND OF KEY PLAYERS, BY SOLUTION
(USD MILLION/MONTH)

5.9.2 INDICATIVE PRICING ANALYSIS OF MODULAR DATA CENTER SOLUTIONS
TABLE 11 INDICATIVE PRICING ANALYSIS OF MODULAR DATA CENTER
SOLUTIONS (1/2)

TABLE 12 INDICATIVE PRICING ANALYSIS OF MODULAR DATA CENTER
SOLUTIONS (2/2)

5.10 CASE STUDY ANALYSIS

5.10.1 CASE STUDY 1: ENERGY VERTIV PROVIDED DATA CENTER COOLING
OPTIMIZATION FOR ONE OF WORLD'S GREENEST COLOCATION OPERATORS

5.10.2 CASE STUDY 2: SCHNEIDER'S FLAGSHIP PLATFORM HELPED TELCO
WITH BUILDING ITS COMPETITIVE ADVANTAGE

5.10.3 CASE STUDY 3: SCALEMATRIX AIDED AEROSPACE & DEFENSE
INDUSTRY TO REDUCE WASTAGE AND DELIVER REQUIRED RESOURCES

5.10.4 CASE STUDY 4: NINI DISTRIBUTION CENTER ENHANCED OPERATIONAL
EFFICIENCY BY DEPLOYING VERTIV SOLUTION SUITE

5.11 PATENT ANALYSIS

FIGURE 28 NUMBER OF PATENTS PUBLISHED, 2012–2022

FIGURE 29 TOP FIVE PATENT OWNERS (GLOBAL)

TABLE 13 TOP TEN PATENT OWNERS (US)

5.12 TARIFF & REGULATORY LANDSCAPE

5.12.1 TARIFF ANALYSIS

TABLE 14 MFN TARIFFS FOR HS CODE: 8537 EXPORTED BY US

TABLE 15 MFN TARIFFS FOR HS CODE: 8537 EXPORTED BY AUSTRALIA

TABLE 16 MFN TARIFF FOR HS CODE: 8537 EXPORTED BY CANADA

5.12.2 REGULATORY BODIES, GOVERNMENT AGENCIES, AND OTHER
ORGANIZATIONS

TABLE 17 NORTH AMERICA: LIST OF REGULATORY BODIES, GOVERNMENT
AGENCIES, AND OTHER ORGANIZATIONS

TABLE 18 EUROPE: LIST OF REGULATORY BODIES, GOVERNMENT AGENCIES,
AND OTHER ORGANIZATIONS

TABLE 19 ASIA PACIFIC: LIST OF REGULATORY BODIES, GOVERNMENT
AGENCIES, AND OTHER ORGANIZATIONS

TABLE 20 REST OF THE WORLD: LIST OF REGULATORY BODIES, GOVERNMENT
AGENCIES, AND OTHER ORGANIZATIONS

5.12.3 KEY ASSOCIATIONS AND REGULATORY STANDARDS

5.12.3.1 American National Standards Institute

- 5.12.3.2 International Organization for Standardization
- 5.12.3.3 European Standards
- 5.12.3.4 Uptime Institute
- 5.12.3.5 ENERGY STAR-certified Products
- 5.12.3.6 National Electrical Manufacturers Association (NEMA)
- 5.12.3.7 Canadian Standards Association (CSA) Group
- 5.12.3.8 Electronics Industries Alliance (EIA)
- 5.12.3.9 Telecommunications Industry Association (TIA)
- 5.12.3.10 Leadership in Energy and Environmental Design (LEED)
- 5.12.3.11 Open Compute Project (OCP)
- 5.12.3.12 Underwriters Laboratories (UL)

5.13 TRENDS/DISRUPTIONS IMPACTING BUYERS

FIGURE 30 TRENDS/DISRUPTIONS IMPACTING BUYERS

5.14 KEY CONFERENCES AND EVENTS IN 2023–2024

TABLE 21 MODULAR DATA CENTER MARKET: DETAILED LIST OF CONFERENCES AND EVENTS, 2023–2024

5.15 MODULAR DATA CENTER MARKET: BUSINESS MODEL ANALYSIS

FIGURE 31 MODULAR DATA CENTER MARKET: BUSINESS MODELS

5.15.1 PRODUCT SALES MODEL

5.15.2 LEASE OR RENTAL MODEL

5.16 TRADE ANALYSIS

TABLE 22 IMPORT DATA, BY COUNTRY, 2018–2022 (USD MILLION)

FIGURE 32 IMPORT DATA, BY COUNTRY, 2018–2022 (USD MILLION)

TABLE 23 EXPORT DATA, BY COUNTRY, 2018–2022 (USD MILLION)

FIGURE 33 EXPORT DATA, BY COUNTRY, 2018–2022 (USD MILLION)

6 MODULAR DATA CENTER MARKET, BY COMPONENT

6.1 INTRODUCTION

6.1.1 COMPONENT: MODULAR DATA CENTER MARKET DRIVERS

FIGURE 34 SOLUTIONS TO HOLD LARGER MARKET SIZE IN 2023

TABLE 24 MODULAR DATA CENTER MARKET, BY COMPONENT, 2017–2022 (USD MILLION)

TABLE 25 MODULAR DATA CENTER MARKET, BY COMPONENT, 2023–2030 (USD MILLION)

6.2 SOLUTIONS

6.2.1 NEED FOR FLEXIBLE AND EFFICIENT INFRASTRUCTURE TO SUPPORT MODERN DATA CENTERS

TABLE 26 SOLUTIONS: MODULAR DATA CENTER MARKET, BY REGION,

2017–2022 (USD MILLION)

TABLE 27 SOLUTIONS: MODULAR DATA CENTER MARKET, BY REGION,
2023–2030 (USD MILLION)

6.3 SERVICES

6.3.1 HIGHER SPENDING ON MAINTENANCE SERVICES TO REDUCE DATA
CENTER DOWNTIME

TABLE 28 SERVICES: MODULAR DATA CENTER MARKET, BY REGION, 2017–2022
(USD MILLION)

TABLE 29 SERVICES: MODULAR DATA CENTER MARKET, BY REGION, 2023–2030
(USD MILLION)

7 MODULAR DATA CENTER MARKET, BY SOLUTION

7.1 INTRODUCTION

7.1.1 SOLUTION: MODULAR DATA CENTER MARKET DRIVERS

FIGURE 35 INDIVIDUAL MODULES TO HOLD LARGER MARKET SIZE IN 2023

TABLE 30 MODULAR DATA CENTER MARKET, BY SOLUTION, 2017–2022 (USD
MILLION)

TABLE 31 MODULAR DATA CENTER MARKET, BY SOLUTION, 2023–2030 (USD
MILLION)

7.2 ALL-IN-ONE MODULES

7.2.1 SCALABILITY AND FLEXIBILITY OF IT INFRASTRUCTURE TO ADJUST
DESIGN AND SIZE FOR FUTURE DEPLOYMENTS

TABLE 32 ALL-IN-ONE MODULES: MODULAR DATA CENTER MARKET, BY REGION,
2017–2022 (USD MILLION)

TABLE 33 ALL-IN-ONE MODULES: MODULAR DATA CENTER MARKET, BY
REGION, 2023–2030 (USD MILLION)

7.3 INDIVIDUAL MODULES

FIGURE 36 IT MODULE TO HOLD LARGEST MARKET SIZE IN 2023

TABLE 34 INDIVIDUAL MODULES: MODULAR DATA CENTER MARKET, BY TYPE,
2017–2022 (USD MILLION)

TABLE 35 INDIVIDUAL MODULES: MODULAR DATA CENTER MARKET, BY TYPE,
2023–2030 (USD MILLION)

TABLE 36 INDIVIDUAL MODULES: MODULAR DATA CENTER MARKET, BY
REGION, 2017–2022 (USD MILLION)

TABLE 37 INDIVIDUAL MODULES: MODULAR DATA CENTER MARKET, BY
REGION, 2023–2030 (USD MILLION)

7.3.1 IT MODULES

7.3.1.1 Deployment of many units at various levels of data center infrastructure to

drive demand for these modules

TABLE 38 IT MODULES: MODULAR DATA CENTER MARKET, BY REGION, 2017–2022 (USD MILLION)

TABLE 39 IT MODULES: MODULAR DATA CENTER MARKET, BY REGION, 2023–2030 (USD MILLION)

7.3.1.2 Server Modules

7.3.1.3 Network Modules

7.3.1.4 Storage Modules

7.3.1.5 Other IT Modules

7.3.2 POWER MODULES

7.3.2.1 High demand for power modules from countries with irregular power supply to drive demand

TABLE 40 POWER MODULES: MODULAR DATA CENTER MARKET, BY REGION, 2017–2022 (USD MILLION)

TABLE 41 POWER MODULES: MODULAR DATA CENTER MARKET, BY REGION, 2023–2030 (USD MILLION)

7.3.2.2 Power monitoring & management modules

7.3.2.3 Power distribution units

7.3.2.4 UPS modules

7.3.2.5 Other power modules

7.3.3 COOLING MODULES

7.3.3.1 Increasing demand to cool data centers to drive their demand

TABLE 42 COOLING MODULES: MODULAR DATA CENTER MARKET, BY REGION, 2017–2022 (USD MILLION)

TABLE 43 COOLING MODULES: MODULAR DATA CENTERS MARKET, BY REGION, 2023–2030 (USD MILLION)

7.3.3.2 Air-cooled modules

7.3.3.3 Cooling towers

7.3.3.4 Chilling units

7.3.3.5 Other cooling modules

8 MODULAR DATA CENTER MARKET, BY SERVICE

8.1 INTRODUCTION

8.1.1 SERVICE: MODULAR DATA CENTER MARKET DRIVERS

FIGURE 37 SUPPORT & MAINTENANCE TO HOLD LARGEST MARKET SIZE IN 2023

TABLE 44 MODULAR DATA CENTER MARKET, BY SERVICE, 2017–2022 (USD MILLION)

TABLE 45 MODULAR DATA CENTER MARKET, BY SERVICE, 2023–2030 (USD MILLION)

8.2 DESIGN & CONSULTING

8.2.1 HIGH DEMAND FOR END-TO-END CONSULTATIVE APPROACH FOR INFRASTRUCTURE MODERNIZATION TO DRIVE DEMAND

TABLE 46 DESIGN & CONSULTING: MODULAR DATA CENTER MARKET, BY REGION, 2017–2022 (USD MILLION)

TABLE 47 DESIGN & CONSULTING: MODULAR DATA CENTER MARKET, BY REGION, 2023–2030 (USD MILLION)

8.3 INTEGRATION & DEPLOYMENT

8.3.1 NEED FOR INTEGRATION OF SEPARATE DATA CENTER MODULES AND EFFECTIVE DEPLOYMENT TO CONTRIBUTE TO GROWTH

TABLE 48 INTEGRATION & DEPLOYMENT: MODULAR DATA CENTER MARKET, BY REGION, 2017–2022 (USD MILLION)

TABLE 49 INTEGRATION & DEPLOYMENT: MODULAR DATA CENTER MARKET, BY REGION, 2023–2030 (USD MILLION)

8.4 SUPPORT & MAINTENANCE

8.4.1 HIGH DEMAND FOR REMOTE SUPPORT SERVICES TO DRIVE MARKET GROWTH

TABLE 50 SUPPORT & MAINTENANCE: MODULAR DATA CENTER MARKET, BY REGION, 2017–2022 (USD MILLION)

TABLE 51 SUPPORT & MAINTENANCE: MODULAR DATA CENTER MARKET, BY REGION, 2023–2030 (USD MILLION)

9 MODULAR DATA CENTER MARKET, BY ORGANIZATION SIZE

9.1 INTRODUCTION

9.1.1 ORGANIZATION SIZE: MODULAR DATA CENTER MARKET DRIVERS

FIGURE 38 LARGE ENTERPRISES TO HOLD LARGER MARKET SIZE IN 2023

TABLE 52 MODULAR DATA CENTER MARKET, BY ORGANIZATION SIZE, 2017–2022 (USD MILLION)

TABLE 53 MODULAR DATA CENTER MARKET, BY ORGANIZATION SIZE, 2023–2030 (USD MILLION)

9.2 SMES

9.2.1 NEED TO DEPLOY DATA CENTERS AT LOWER COST COMPARED TO TRADITIONAL SYSTEMS TO DRIVE DEMAND FOR MODULAR DATA CENTERS AMONG SMES

TABLE 54 SMES: MODULAR DATA CENTER MARKET, BY REGION, 2017–2022 (USD MILLION)

TABLE 55 SMES: MODULAR DATA CENTER MARKET, BY REGION, 2023–2030
(USD MILLION)

9.3 LARGE ENTERPRISES

9.3.1 NEED FOR EVER-INCREASING DATA STORAGE TO DRIVE DEMAND FOR
MODULAR DATA CENTERS AMONG LARGE ENTERPRISES

TABLE 56 LARGE ENTERPRISES: MODULAR DATA CENTER MARKET, BY
REGION, 2017–2022 (USD MILLION)

TABLE 57 LARGE ENTERPRISES: MODULAR DATA CENTER MARKET, BY
REGION, 2023–2030 (USD MILLION)

10 MODULAR DATA CENTER MARKET, BY VERTICAL

10.1 INTRODUCTION

10.1.1 VERTICAL: MODULAR DATA CENTER MARKET DRIVERS

FIGURE 39 BFSI TO HOLD LARGEST MARKET SIZE IN 2023

TABLE 58 MODULAR DATA CENTER MARKET, BY VERTICAL, 2017–2022 (USD
MILLION)

TABLE 59 MODULAR DATA CENTER MARKET, BY VERTICAL, 2023–2030 (USD
MILLION)

10.2 BFSI

10.2.1 FAST GROWTH OF ELECTRONIC BANKING, PAPERLESS STORAGE, AND
VIRTUALIZATION TO DRIVE DEMAND FOR MODULAR DATA CENTERS

TABLE 60 BFSI: MODULAR DATA CENTER MARKET, BY REGION, 2017–2022 (USD
MILLION)

TABLE 61 BFSI: MODULAR DATA CENTER MARKET, BY REGION, 2023–2030 (USD
MILLION)

10.2.2 BFSI: APPLICATION AREAS

10.2.2.1 Disaster Recovery & Business Continuity

10.2.2.2 Scalable Data Processing

10.2.2.3 Compliance & Security

10.2.2.4 Other BFSI Applications

10.3 IT & TELECOM

10.3.1 HIGH DEMAND FOR DATA SECURITY, INTEGRATED PHYSICAL
SECURITY, AND PRODUCTIVITY TO DRIVE DEMAND OR MODULAR DATA
CENTERS IN THIS VERTICAL

TABLE 62 IT & TELECOM: MODULAR DATA CENTER MARKET, BY REGION,
2017–2022 (USD MILLION)

TABLE 63 IT & TELECOM: MODULAR DATA CENTER MARKET, BY REGION,
2023–2030 (USD MILLION)

10.3.2 IT & TELECOM: APPLICATION AREAS

10.3.2.1 Edge Computing

10.3.2.2 Disaster Recovery

10.3.2.3 Data Center Expansion

10.3.2.4 Other IT & Telecom Applications

10.4 GOVERNMENT & DEFENSE

10.4.1 INCREASED AWARENESS OF INFORMATION DIGITALIZATION TO
CONTRIBUTE TO DEMAND FOR MODULAR DATA CENTERS IN THIS VERTICAL
TABLE 64 GOVERNMENT & DEFENSE: MODULAR DATA CENTER MARKET, BY
REGION, 2017–2022 (USD MILLION)

TABLE 65 GOVERNMENT & DEFENSE: MODULAR DATA CENTER MARKET, BY
REGION, 2023–2030 (USD MILLION)

10.4.2 GOVERNMENT & DEFENSE: APPLICATION AREAS

10.4.2.1 Tactical Data Centers

10.4.2.2 Disaster Recovery & Continuity of Operations

10.4.2.3 Classified Information Processing & Storage

10.4.2.4 Other Government & Defense Applications

10.5 HEALTHCARE

10.5.1 DEMAND FOR SHIFT OF MANUAL PATIENT RECORDS TO ELECTRONIC
STORAGE TO DRIVE DEMAND FOR MODULAR DATA CENTERS

TABLE 66 HEALTHCARE: MODULAR DATA CENTER MARKET, BY REGION,
2017–2022 (USD MILLION)

TABLE 67 HEALTHCARE: MODULAR DATA CENTER MARKET, BY REGION,
2023–2030 (USD MILLION)

10.5.2 HEALTHCARE: APPLICATION AREAS

10.5.2.1 Health Information Management

10.5.2.2 Telemedicine & Remote Health Services

10.5.2.3 Other Healthcare Applications

10.6 RETAIL

10.6.1 NEED TO MAINTAIN CUSTOMER'S PERSONAL, FINANCIAL, AND STOCK
DATA TO DRIVE DEMAND FOR MODULAR DATA CENTERS IN THIS VERTICAL

TABLE 68 RETAIL: MODULAR DATA CENTER MARKET, BY REGION, 2017–2022
(USD MILLION)

TABLE 69 RETAIL: MODULAR DATA CENTER MARKET, BY REGION, 2023–2030
(USD MILLION)

10.6.2 RETAIL: APPLICATION AREAS

10.6.2.1 E-commerce & Online Retail Platforms

10.6.2.2 Point of Sale (POS) Systems

10.6.2.3 Inventory Management

10.6.2.4 Other Retail Applications

10.7 MEDIA & ENTERTAINMENT

10.7.1 NEED FOR MULTIMEDIA STORAGE AND UNINTERRUPTED ACCESS
FROM ANYWHERE TO DRIVE DEMAND FOR MODULAR DATA CENTERS

TABLE 70 MEDIA & ENTERTAINMENT: MODULAR DATA CENTER MARKET, BY
REGION, 2017–2022 (USD MILLION)

TABLE 71 MEDIA & ENTERTAINMENT: MODULAR DATA CENTER MARKET, BY
REGION, 2023–2030 (USD MILLION)

10.7.2 MEDIA & ENTERTAINMENT: APPLICATION AREAS

10.7.2.1 Content Delivery Networks (CDNs)

10.7.2.2 Post-production & Video Editing

10.7.2.3 Broadcasting & Live Streaming

10.7.2.4 Other Media & Entertainment Applications

10.8 MANUFACTURING

10.8.1 NEED FOR IT SYSTEMS TO STREAMLINE LOGISTICS AND PRODUCTION
PROCESSES TO DRIVE DEMAND IN THIS VERTICAL

TABLE 72 MANUFACTURING: MODULAR DATA CENTER MARKET, BY REGION,
2017–2022 (USD MILLION)

TABLE 73 MANUFACTURING: MODULAR DATA CENTER MARKET, BY REGION,
2023–2030 (USD MILLION)

10.8.2 MANUFACTURING: APPLICATION AREAS

10.8.2.1 Manufacturing Process Control

10.8.2.2 Supply Chain Management

10.8.2.3 Quality Control & Testing

10.8.2.4 Other Manufacturing Applications

10.9 OTHER VERTICALS

TABLE 74 OTHER VERTICALS: MODULAR DATA CENTER MARKET, BY REGION,
2017–2022 (USD MILLION)

TABLE 75 OTHER VERTICALS: MODULAR DATA CENTER MARKET, BY REGION,
2023–2030 (USD MILLION)

11 MODULAR DATA CENTER MARKET, BY REGION

11.1 INTRODUCTION

FIGURE 40 ASIA PACIFIC TO GROW AT HIGHEST CAGR DURING FORECAST
PERIOD

TABLE 76 MODULAR DATA CENTER MARKET, BY REGION, 2017–2022 (USD
MILLION)

TABLE 77 MODULAR DATA CENTER MARKET, BY REGION, 2023–2030 (USD

MILLION)

11.2 NORTH AMERICA

11.2.1 NORTH AMERICA: MODULAR DATA CENTER MARKET DRIVERS

11.2.2 NORTH AMERICA: RECESSION IMPACT

FIGURE 41 NORTH AMERICA: MARKET SNAPSHOT

TABLE 78 NORTH AMERICA: MODULAR DATA CENTER MARKET, BY COMPONENT, 2017–2022 (USD MILLION)

TABLE 79 NORTH AMERICA: MODULAR DATA CENTER MARKET, BY COMPONENT, 2023–2030 (USD MILLION)

TABLE 80 NORTH AMERICA: MODULAR DATA CENTER MARKET, BY SOLUTION, 2017–2022 (USD MILLION)

TABLE 81 NORTH AMERICA: MODULAR DATA CENTER MARKET, BY SOLUTION, 2023–2030 (USD MILLION)

TABLE 82 NORTH AMERICA: MODULAR DATA CENTER MARKET, BY SERVICE, 2017–2022 (USD MILLION)

TABLE 83 NORTH AMERICA: MODULAR DATA CENTER MARKET, BY SERVICE, 2023–2030 (USD MILLION)

TABLE 84 NORTH AMERICA: MODULAR DATA CENTER MARKET, BY INDIVIDUAL MODULE, 2017–2022 (USD MILLION)

TABLE 85 NORTH AMERICA: MODULAR DATA CENTER MARKET, BY INDIVIDUAL MODULE, 2023–2030 (USD MILLION)

TABLE 86 NORTH AMERICA: MODULAR DATA CENTER MARKET, BY ORGANIZATION SIZE, 2017–2022 (USD MILLION)

TABLE 87 NORTH AMERICA: MODULAR DATA CENTER MARKET, BY ORGANIZATION SIZE, 2023–2030 (USD MILLION)

TABLE 88 NORTH AMERICA: MODULAR DATA CENTER MARKET, BY VERTICAL, 2017–2022 (USD MILLION)

TABLE 89 NORTH AMERICA: MODULAR DATA CENTER MARKET, BY VERTICAL, 2023–2030 (USD MILLION)

TABLE 90 NORTH AMERICA: MODULAR DATA CENTER MARKET, BY COUNTRY, 2017–2022 (USD MILLION)

TABLE 91 NORTH AMERICA: MODULAR DATA CENTER MARKET, BY COUNTRY, 2023–2030 (USD MILLION)

11.2.3 US

11.2.3.1 Surge in demand for green data centers to drive market growth in US

TABLE 92 US: MODULAR DATA CENTER MARKET, BY COMPONENT, 2017–2022 (USD MILLION)

TABLE 93 US: MODULAR DATA CENTER MARKET, BY COMPONENT, 2023–2030 (USD MILLION)

11.2.4 CANADA

11.2.4.1 Need for advanced technological tools, cloud platforms, and various other on-demand services to drive market growth in Canada

TABLE 94 CANADA: MODULAR DATA CENTER MARKET, BY COMPONENT, 2017–2022 (USD MILLION)

TABLE 95 CANADA: MODULAR DATA CENTER MARKET, BY COMPONENT, 2023–2030 (USD MILLION)

11.3 EUROPE

11.3.1 EUROPE: MODULAR DATA CENTER MARKET DRIVERS

11.3.2 EUROPE: RECESSION IMPACT

TABLE 96 EUROPE: MODULAR DATA CENTER MARKET, BY COMPONENT, 2017–2022 (USD MILLION)

TABLE 97 EUROPE: MODULAR DATA CENTER MARKET, BY COMPONENT, 2023–2030 (USD MILLION)

TABLE 98 EUROPE: MODULAR DATA CENTER MARKET, BY SOLUTION, 2017–2022 (USD MILLION)

TABLE 99 EUROPE: MODULAR DATA CENTER MARKET, BY SOLUTION, 2023–2030 (USD MILLION)

TABLE 100 EUROPE: MODULAR DATA CENTER MARKET, BY SERVICE, 2017–2022 (USD MILLION)

TABLE 101 EUROPE: MODULAR DATA CENTER MARKET, BY SERVICE, 2023–2030 (USD MILLION)

TABLE 102 EUROPE: MODULAR DATA CENTER MARKET, BY INDIVIDUAL MODULE, 2017–2022 (USD MILLION)

TABLE 103 EUROPE: MODULAR DATA CENTER MARKET, BY INDIVIDUAL MODULE, 2023–2030 (USD MILLION)

TABLE 104 EUROPE: MODULAR DATA CENTER MARKET, BY ORGANIZATION SIZE, 2017–2022 (USD MILLION)

TABLE 105 EUROPE: MODULAR DATA CENTER MARKET, BY ORGANIZATION SIZE, 2023–2030 (USD MILLION)

TABLE 106 EUROPE: MODULAR DATA CENTER MARKET, BY VERTICAL, 2017–2022 (USD MILLION)

TABLE 107 EUROPE: MODULAR DATA CENTER MARKET, BY VERTICAL, 2023–2030 (USD MILLION)

TABLE 108 EUROPE: MODULAR DATA CENTER MARKET, BY COUNTRY, 2017–2022 (USD MILLION)

TABLE 109 EUROPE: MODULAR DATA CENTER MARKET, BY COUNTRY, 2023–2030 (USD MILLION)

11.3.3 UK

11.3.3.1 Companies in UK to adopt modular data center solutions to enhance operational efficiency

TABLE 110 UK: MODULAR DATA CENTER MARKET, BY COMPONENT, 2017–2022 (USD MILLION)

TABLE 111 UK: MODULAR DATA CENTER MARKET, BY COMPONENT, 2023–2030 (USD MILLION)

11.3.4 GERMANY

11.3.4.1 Adoption of industry 4.0 and increased digital economy initiatives to drive modular data center market growth in Germany

TABLE 112 GERMANY: MODULAR DATA CENTER MARKET, BY COMPONENT, 2017–2022 (USD MILLION)

TABLE 113 GERMANY: MODULAR DATA CENTER MARKET, BY COMPONENT, 2023–2030 (USD MILLION)

11.3.5 FRANCE

11.3.5.1 Huge investments by global modular data center providers because of changing customer behavior to drive growth in France

TABLE 114 FRANCE: MODULAR DATA CENTER MARKET, BY COMPONENT, 2017–2022 (USD MILLION)

TABLE 115 FRANCE: MODULAR DATA CENTER MARKET, BY COMPONENT, 2023–2030 (USD MILLION)

11.3.6 ITALY

11.3.6.1 Digital transformation initiatives in Italy to drive growth of modular data centers

TABLE 116 ITALY: MODULAR DATA CENTER MARKET, BY COMPONENT, 2017–2022 (USD MILLION)

TABLE 117 ITALY: MODULAR DATA CENTER MARKET, BY COMPONENT, 2023–2030 (USD MILLION)

11.3.7 REST OF EUROPE

TABLE 118 REST OF EUROPE: MODULAR DATA CENTER MARKET, BY COMPONENT, 2017–2022 (USD MILLION)

TABLE 119 REST OF EUROPE: MODULAR DATA CENTER MARKET, BY COMPONENT, 2023–2030 (USD MILLION)

11.4 ASIA PACIFIC

11.4.1 ASIA PACIFIC: MODULAR DATA CENTER MARKET DRIVERS

11.4.2 ASIA PACIFIC: RECESSION IMPACT

FIGURE 42 ASIA PACIFIC: MARKET SNAPSHOT

TABLE 120 ASIA PACIFIC: MODULAR DATA CENTER MARKET, BY COMPONENT, 2017–2022 (USD MILLION)

TABLE 121 ASIA PACIFIC: MODULAR DATA CENTER MARKET, BY COMPONENT,

2023–2030 (USD MILLION)

TABLE 122 ASIA PACIFIC: MODULAR DATA CENTER MARKET, BY SOLUTION,
2017–2022 (USD MILLION)

TABLE 123 ASIA PACIFIC: MODULAR DATA CENTER MARKET, BY SOLUTION,
2023–2030 (USD MILLION)

TABLE 124 ASIA PACIFIC: MODULAR DATA CENTER MARKET, BY SERVICE,
2017–2022 (USD MILLION)

TABLE 125 ASIA PACIFIC: MODULAR DATA CENTER MARKET, BY SERVICE,
2023–2030 (USD MILLION)

TABLE 126 ASIA PACIFIC: MODULAR DATA CENTER MARKET, BY INDIVIDUAL
MODULE, 2017–2022 (USD MILLION)

TABLE 127 ASIA PACIFIC: MODULAR DATA CENTER MARKET, BY INDIVIDUAL
MODULE, 2023–2030 (USD MILLION)

TABLE 128 ASIA PACIFIC: MODULAR DATA CENTER MARKET, BY
ORGANIZATION SIZE, 2017–2022 (USD MILLION)

TABLE 129 ASIA PACIFIC: MODULAR DATA CENTER MARKET, BY
ORGANIZATION SIZE, 2023–2030 (USD MILLION)

TABLE 130 ASIA PACIFIC: MODULAR DATA CENTER MARKET, BY VERTICAL,
2017–2022 (USD MILLION)

TABLE 131 ASIA PACIFIC: MODULAR DATA CENTER MARKET, BY VERTICAL,
2023–2030 (USD MILLION)

TABLE 132 ASIA PACIFIC: MODULAR DATA CENTER MARKET, BY COUNTRY,
2017–2022 (USD MILLION)

TABLE 133 ASIA PACIFIC: MODULAR DATA CENTER MARKET, BY COUNTRY,
2023–2030 (USD MILLION)

11.4.3 AUSTRALIA & NEW ZEALAND

11.4.3.1 Government organizations and telcos investing in Australia's IoT and smart city ecosystem to drive market growth

TABLE 134 AUSTRALIA & NEW ZEALAND: MODULAR DATA CENTER MARKET, BY
COMPONENT, 2017–2022 (USD MILLION)

TABLE 135 AUSTRALIA & NEW ZEALAND: MODULAR DATA CENTER MARKET, BY
COMPONENT, 2023–2030 (USD MILLION)

11.4.4 JAPAN

11.4.4.1 Technology providers in Japan to introduce modular data center technologies

TABLE 136 JAPAN: MODULAR DATA CENTER MARKET, BY COMPONENT,
2017–2022 (USD MILLION)

TABLE 137 JAPAN: MODULAR DATA CENTER MARKET, BY COMPONENT,
2023–2030 (USD MILLION)

11.4.5 CHINA

11.4.5.1 Demand for data processing and information interaction to drive growth of Chinese modular data center market

TABLE 138 CHINA: MODULAR DATA CENTER MARKET, BY COMPONENT, 2017–2022 (USD MILLION)

TABLE 139 CHINA: MODULAR DATA CENTER MARKET, BY COMPONENT, 2023–2030 (USD MILLION)

11.4.6 REST OF ASIA PACIFIC

TABLE 140 REST OF ASIA PACIFIC: MODULAR DATA CENTER MARKET, BY COMPONENT, 2017–2022 (USD MILLION)

TABLE 141 REST OF ASIA PACIFIC: MODULAR DATA CENTER MARKET, BY COMPONENT, 2023–2030 (USD MILLION)

11.5 MIDDLE EAST & AFRICA

11.5.1 MIDDLE EAST & AFRICA: MODULAR DATA CENTER MARKET DRIVERS

11.5.2 MIDDLE EAST & AFRICA: RECESSION IMPACT

TABLE 142 MIDDLE EAST & AFRICA: MODULAR DATA CENTER MARKET, BY COMPONENT, 2017–2022 (USD MILLION)

TABLE 143 MIDDLE EAST & AFRICA: MODULAR DATA CENTER MARKET, BY COMPONENT, 2023–2030 (USD MILLION)

TABLE 144 MIDDLE EAST & AFRICA: MODULAR DATA CENTER MARKET, BY SOLUTION, 2017–2022 (USD MILLION)

TABLE 145 MIDDLE EAST & AFRICA: MODULAR DATA CENTER MARKET, BY SOLUTION, 2023–2030 (USD MILLION)

TABLE 146 MIDDLE EAST & AFRICA: MODULAR DATA CENTER MARKET, BY SERVICE, 2017–2022 (USD MILLION)

TABLE 147 MIDDLE EAST & AFRICA: MODULAR DATA CENTER MARKET, BY SERVICE, 2023–2030 (USD MILLION)

TABLE 148 MIDDLE EAST & AFRICA: MODULAR DATA CENTER MARKET, BY INDIVIDUAL MODULE, 2017–2022 (USD MILLION)

TABLE 149 MIDDLE EAST & AFRICA: MODULAR DATA CENTER MARKET, BY INDIVIDUAL MODULE, 2023–2030 (USD MILLION)

TABLE 150 MIDDLE EAST & AFRICA: MODULAR DATA CENTER MARKET, BY ORGANIZATION SIZE, 2017–2022 (USD MILLION)

TABLE 151 MIDDLE EAST & AFRICA: MODULAR DATA CENTER MARKET, BY ORGANIZATION SIZE, 2023–2030 (USD MILLION)

TABLE 152 MIDDLE EAST & AFRICA: MODULAR DATA CENTER MARKET, BY VERTICAL, 2017–2022 (USD MILLION)

TABLE 153 MIDDLE EAST & AFRICA: MODULAR DATA CENTER MARKET, BY VERTICAL, 2023–2030 (USD MILLION)

TABLE 154 MIDDLE EAST & AFRICA: MODULAR DATA CENTER MARKET, BY COUNTRY, 2017–2022 (USD MILLION)

TABLE 155 MIDDLE EAST & AFRICA: MODULAR DATA CENTER MARKET, BY COUNTRY, 2023–2030 (USD MILLION)

11.5.3 GCC COUNTRIES (GULF COOPERATION COUNCIL)

11.5.3.1 Saudi Arabia

11.5.3.1.1 Saudi Vision 2030 initiatives to fuel demand for cloud, data centers, and big data

TABLE 156 SAUDI ARABIA: MODULAR DATA CENTER MARKET, BY COMPONENT, 2017–2022 (USD MILLION)

TABLE 157 SAUDI ARABIA: MODULAR DATA CENTER MARKET, BY COMPONENT, 2023–2030 (USD MILLION)

11.5.3.2 UAE

11.5.3.2.1 High mobile device per user ratio to drive market for modular data centers

TABLE 158 UAE: MODULAR DATA CENTER MARKET, BY COMPONENT, 2017–2022 (USD MILLION)

TABLE 159 UAE: MODULAR DATA CENTER MARKET, BY COMPONENT, 2023–2030 (USD MILLION)

11.5.3.3 Other GCC Countries

TABLE 160 OTHER GCC COUNTRIES: MODULAR DATA CENTER MARKET, BY COMPONENT, 2017–2022 (USD MILLION)

TABLE 161 OTHER GCC COUNTRIES: MODULAR DATA CENTER MARKET, BY COMPONENT, 2023–2030 (USD MILLION)

11.5.4 SOUTH AFRICA

11.5.4.1 High usage of mobile technologies and colocation facilities to contribute to market growth in South Africa

TABLE 162 SOUTH AFRICA: MODULAR DATA CENTER MARKET, BY COMPONENT, 2017–2022 (USD MILLION)

TABLE 163 SOUTH AFRICA: MODULAR DATA CENTER MARKET, BY COMPONENT, 2023–2030 (USD MILLION)

11.5.5 REST OF MIDDLE EAST & AFRICA

TABLE 164 REST OF MIDDLE EAST & AFRICA: MODULAR DATA CENTER MARKET, BY COMPONENT, 2017–2022 (USD MILLION)

TABLE 165 REST OF MIDDLE EAST & AFRICA: MODULAR DATA CENTER MARKET, BY COMPONENT, 2023–2030 (USD MILLION)

11.6 LATIN AMERICA

11.6.1 LATIN AMERICA: MODULAR DATA CENTER MARKET DRIVERS

11.6.2 LATIN AMERICA: RECESSION IMPACT

TABLE 166 LATIN AMERICA: MODULAR DATA CENTER MARKET, BY COMPONENT, 2017–2022 (USD MILLION)

TABLE 167 LATIN AMERICA: MODULAR DATA CENTER MARKET, BY COMPONENT, 2023–2030 (USD MILLION)

TABLE 168 LATIN AMERICA: MODULAR DATA CENTER MARKET, BY SOLUTION, 2017–2022 (USD MILLION)

TABLE 169 LATIN AMERICA: MODULAR DATA CENTER MARKET, BY SOLUTION, 2023–2030 (USD MILLION)

TABLE 170 LATIN AMERICA: MODULAR DATA CENTER MARKET, BY SERVICE, 2017–2022 (USD MILLION)

TABLE 171 LATIN AMERICA: MODULAR DATA CENTER MARKET, BY SERVICE, 2023–2030 (USD MILLION)

TABLE 172 LATIN AMERICA: MODULAR DATA CENTER MARKET, BY INDIVIDUAL MODULE, 2017–2022 (USD MILLION)

TABLE 173 LATIN AMERICA: MODULAR DATA CENTER MARKET, BY INDIVIDUAL MODULE, 2023–2030 (USD MILLION)

TABLE 174 LATIN AMERICA: MODULAR DATA CENTER MARKET, BY ORGANIZATION SIZE, 2017–2022 (USD MILLION)

TABLE 175 LATIN AMERICA: MODULAR DATA CENTER MARKET, BY ORGANIZATION SIZE, 2023–2030 (USD MILLION)

TABLE 176 LATIN AMERICA: MODULAR DATA CENTER MARKET, BY VERTICAL, 2017–2022 (USD MILLION)

TABLE 177 LATIN AMERICA: MODULAR DATA CENTER MARKET, BY VERTICAL, 2023–2030 (USD MILLION)

TABLE 178 LATIN AMERICA: MODULAR DATA CENTER MARKET, BY COUNTRY, 2017–2022 (USD MILLION)

TABLE 179 LATIN AMERICA: MODULAR DATA CENTER MARKET, BY COUNTRY, 2023–2030 (USD MILLION)

11.6.3 BRAZIL

11.6.3.1 Rise in technology assimilation among enterprises and consumers to drive demand for modular data centers

TABLE 180 BRAZIL: MODULAR DATA CENTER MARKET, BY COMPONENT, 2017–2022 (USD MILLION)

TABLE 181 BRAZIL: MODULAR DATA CENTER MARKET, BY COMPONENT, 2023–2030 (USD MILLION)

11.6.4 MEXICO

11.6.4.1 Increased opportunities for content delivery providers to drive market for modular data centers in Mexico

TABLE 182 MEXICO: MODULAR DATA CENTER MARKET, BY COMPONENT,

2017–2022 (USD MILLION)

TABLE 183 MEXICO: MODULAR DATA CENTER MARKET, BY COMPONENT,
2023–2030 (USD MILLION)

11.6.5 REST OF LATIN AMERICA

TABLE 184 REST OF LATIN AMERICA: MODULAR DATA CENTER MARKET, BY
COMPONENT, 2017–2022 (USD MILLION)

TABLE 185 REST OF LATIN AMERICA: MODULAR DATA CENTER MARKET, BY
COMPONENT, 2023–2030 (USD MILLION)

12 COMPETITIVE LANDSCAPE

12.1 OVERVIEW

12.2 STRATEGIES ADOPTED BY KEY PLAYERS/RIGHT TO WIN

TABLE 186 OVERVIEW OF STRATEGIES ADOPTED BY KEY MODULAR DATA
CENTER VENDORS

12.3 REVENUE ANALYSIS

FIGURE 43 HISTORICAL FIVE-YEAR REVENUE ANALYSIS OF LEADING PLAYERS,
2018–2022 (USD BILLION)

12.4 COMPANY FINANCIAL METRICS

FIGURE 44 TRADING COMPARABLES, 2023 (EV/EBITDA)

12.5 GLOBAL SNAPSHOT OF KEY MARKET PARTICIPANTS

FIGURE 45 MODULAR DATA CENTER MARKET: GLOBAL SNAPSHOT OF KEY
MARKET PARTICIPANTS, 2022

12.6 MARKET SHARE ANALYSIS

FIGURE 46 MODULAR DATA CENTER MARKET SHARE ANALYSIS, 2022

TABLE 187 MODULAR DATA CENTER MARKET: DEGREE OF COMPETITION

12.7 MODULAR DATA CENTER MARKET: VENDOR PRODUCTS/ BRANDS
COMPARISON

TABLE 188 VENDOR PRODUCTS/BRANDS COMPARISON

12.8 COMPANY EVALUATION MATRIX

FIGURE 47 COMPANY EVALUATION MATRIX: CRITERIA WEIGHTAGE

12.8.1 STARS

12.8.2 EMERGING LEADERS

12.8.3 PERVASIVE PLAYERS

12.8.4 PARTICIPANTS

FIGURE 48 MODULAR DATA CENTER MARKET: COMPANY EVALUATION MATRIX,
2022 (KEY PLAYERS)

12.8.5 COMPANY PRODUCT FOOTPRINT ANALYSIS

TABLE 189 COMPANY PRODUCT FOOTPRINT

TABLE 190 COMPANY FOOTPRINT, BY COMPONENT

TABLE 191 COMPANY FOOTPRINT, BY VERTICAL

TABLE 192 COMPANY FOOTPRINT, BY REGION

12.9 STARTUP/SME EVALUATION MATRIX

FIGURE 49 STARTUP/SME EVALUATION MATRIX: CRITERIA WEIGHTAGE

12.9.1 PROGRESSIVE COMPANIES

12.9.2 RESPONSIVE COMPANIES

12.9.3 DYNAMIC COMPANIES

12.9.4 STARTING BLOCKS

FIGURE 50 MODULAR DATA CENTER MARKET: STARTUP/SME EVALUATION MATRIX, 2022

12.9.5 COMPETITIVE BENCHMARKING

TABLE 193 MODULAR DATA CENTER MARKET: DETAILED LIST OF KEY STARTUP/SMES

TABLE 194 STARTUP/SME FOOTPRINT

12.10 KEY MARKET DEVELOPMENTS

12.10.1 PRODUCT LAUNCHES AND ENHANCEMENTS

TABLE 195 PRODUCT LAUNCHES AND ENHANCEMENTS, 2021–2023

12.10.2 DEALS

TABLE 196 DEALS, 2021–2023

13 COMPANY PROFILES

13.1 INTRODUCTION

(Business overview, Products offered, Recent Developments, Product launches, Deals, MnM view, Right to win, Strategic choices made, Weaknesses and competitive threats)*

13.2 KEY PLAYERS

13.2.1 DELL TECHNOLOGIES

TABLE 197 DELL TECHNOLOGIES: BUSINESS OVERVIEW

FIGURE 51 DELL TECHNOLOGIES: COMPANY SNAPSHOT

TABLE 198 DELL TECHNOLOGIES: SOLUTIONS/SERVICES/PLATFORMS OFFERED

TABLE 199 DELL TECHNOLOGIES: PRODUCT LAUNCHES

TABLE 200 DELL TECHNOLOGIES: DEALS

TABLE 201 DELL TECHNOLOGIES: OTHERS

13.2.2 VERTIV

TABLE 202 VERTIV: BUSINESS OVERVIEW

FIGURE 52 VERTIV: COMPANY SNAPSHOT

TABLE 203 VERTIV: SOLUTIONS/SERVICES/PLATFORMS OFFERED

TABLE 204 VERTIV: PRODUCT LAUNCH

TABLE 205 VERTIV: DEALS

13.2.3 SCHNEIDER ELECTRIC

TABLE 206 SCHNEIDER ELECTRIC: BUSINESS OVERVIEW

FIGURE 53 SCHNEIDER ELECTRIC: COMPANY SNAPSHOT

TABLE 207 SCHNEIDER ELECTRIC: SOLUTIONS/SERVICES/PLATFORMS
OFFERED

TABLE 208 SCHNEIDER ELECTRIC: PRODUCT LAUNCHES

TABLE 209 SCHNEIDER ELECTRIC: DEALS

13.2.4 IBM

TABLE 210 IBM: BUSINESS OVERVIEW

FIGURE 54 IBM: COMPANY SNAPSHOT

TABLE 211 IBM: SOLUTIONS/SERVICES/PLATFORMS OFFERED

TABLE 212 IBM: PRODUCT LAUNCH

13.2.5 HUAWEI

TABLE 213 HUAWEI: BUSINESS OVERVIEW

FIGURE 55 HUAWEI: COMPANY SNAPSHOT

TABLE 214 HUAWEI: SOLUTIONS/SERVICES/PLATFORMS OFFERED

TABLE 215 HUAWEI: PRODUCT LAUNCH

TABLE 216 HUAWEI: DEALS

13.2.6 EATON

TABLE 217 EATON: BUSINESS OVERVIEW

FIGURE 56 EATON: COMPANY SNAPSHOT

TABLE 218 EATON: SOLUTIONS/SERVICES/PLATFORMS OFFERED

TABLE 219 EATON: PRODUCT LAUNCH

TABLE 220 EATON: DEALS

TABLE 221 EATON: OTHERS

13.2.7 RITTAL

TABLE 222 RITTAL: BUSINESS OVERVIEW

TABLE 223 RITTAL: SOLUTIONS/SERVICES/PLATFORMS OFFERED

TABLE 224 RITTAL: PRODUCT LAUNCH

TABLE 225 RITTAL: DEALS

13.2.8 HPE

TABLE 226 HPE: BUSINESS OVERVIEW

FIGURE 57 HPE: COMPANY SNAPSHOT

TABLE 227 HPE: SOLUTIONS/SERVICES/PLATFORMS OFFERED

TABLE 228 HPE: PRODUCT LAUNCH

TABLE 229 HPE: DEALS

13.2.9 ELTEK

TABLE 230 ELTEK: BUSINESS OVERVIEW

FIGURE 58 ELTEK: COMPANY SNAPSHOT

TABLE 231 ELTEK: SOLUTIONS/SERVICES/PLATFORMS OFFERED

TABLE 232 ELTEK: DEALS

13.2.10 SILENT-AIRE

TABLE 233 SILENT-AIRE: BUSINESS OVERVIEW

TABLE 234 SILENT-AIRE: PRODUCTS OFFERED

TABLE 235 SILENT-AIRE: DEALS

TABLE 236 SILENT-AIRE: OTHERS

*Details on Business overview, Products offered, Recent Developments, Product launches, Deals, MnM view, Right to win, Strategic choices made, Weaknesses and competitive threats might not be captured in case of unlisted companies.

13.3 OTHER PLAYERS

13.3.1 BASELAYER

13.3.2 CANNON TECHNOLOGIES

13.3.3 EDGEMCS

13.3.4 ASPERITAS

13.3.5 RETEX

13.3.6 BOX MODUL

13.3.7 PCX

13.3.8 BLADEROOM

13.3.9 RAHI SYSTEMS

13.3.10 SCALEMATRIX

13.3.11 365 DATA CENTERS

13.3.12 CORESITE

13.3.13 FIBERHOME

13.3.14 STULZ

13.3.15 CUPERTINO ELECTRIC, INC.

13.3.16 KSTAR

13.3.17 MICROSOFT

13.3.18 ORACLE

13.3.19 AWS

13.3.20 META

13.3.21 APPLE

13.3.22 EQUINIX

14 ADJACENT AND RELATED MARKETS

14.1 INTRODUCTION

14.1.1 RELATED MARKETS

14.2 DATA CENTER RACK MARKET

TABLE 237 DATA CENTER RACK MARKET, BY COMPONENT, 2018–2021 (USD MILLION)

TABLE 238 DATA CENTER RACK MARKET, BY COMPONENT, 2022–2027 (USD MILLION)

TABLE 239 DATA CENTER RACK MARKET, BY SERVICE, 2018–2021 (USD MILLION)

TABLE 240 DATA CENTER RACK MARKET, BY SERVICE, 2022–2027 (USD MILLION)

TABLE 241 DATA CENTER RACK MARKET, BY RACK TYPE, 2018–2021 (USD MILLION)

TABLE 242 DATA CENTER RACK MARKET, BY RACK TYPE, 2022–2027 (USD MILLION)

TABLE 243 DATA CENTER RACK MARKET, BY RACK HEIGHT, 2018–2021 (USD MILLION)

TABLE 244 DATA CENTER RACK MARKET, BY RACK HEIGHT, 2022–2027 (USD MILLION)

TABLE 245 DATA CENTER RACK MARKET, BY RACK WIDTH, 2018–2021 (USD MILLION)

TABLE 246 DATA CENTER RACK MARKET, BY RACK WIDTH, 2022–2027 (USD MILLION)

TABLE 247 DATA CENTER RACK MARKET, BY DATA CENTER SIZE, 2018–2021 (USD MILLION)

TABLE 248 DATA CENTER RACK MARKET, BY DATA CENTER SIZE, 2022–2027 (USD MILLION)

TABLE 249 DATA CENTER RACK MARKET, BY VERTICAL, 2018–2021 (USD MILLION)

TABLE 250 DATA CENTER RACK MARKET, BY VERTICAL, 2022–2027 (USD MILLION)

TABLE 251 DATA CENTER RACK MARKET, BY REGION, 2018–2021 (USD MILLION)

TABLE 252 DATA CENTER RACK MARKET, BY REGION, 2022–2027 (USD MILLION)

14.3 MICRO MOBILE DATA CENTER MARKET

TABLE 253 MICRO MOBILE DATA CENTER MARKET, BY APPLICATION, 2016–2019 (USD MILLION)

TABLE 254 MICRO MOBILE DATA CENTER MARKET, BY APPLICATION, 2020–2025 (USD MILLION)

TABLE 255 MICRO MOBILE DATA CENTER MARKET, BY RU, 2016–2019 (USD MILLION)

TABLE 256 MICRO MOBILE DATA CENTER MARKET, BY RU, 2020–2025 (USD MILLION)

TABLE 257 MICRO MOBILE DATA CENTER MARKET, BY ORGANIZATION SIZE, 2016–2019 (USD MILLION)

TABLE 258 MICRO MOBILE DATA CENTER MARKET, BY ORGANIZATION SIZE, 2020–2025 (USD MILLION)

TABLE 259 MICRO MOBILE DATA CENTER MARKET, BY VERTICAL, 2016–2019 (USD MILLION)

TABLE 260 MICRO MOBILE DATA CENTER MARKET, BY VERTICAL, 2020–2025 (USD MILLION)

TABLE 261 MICRO MOBILE DATA CENTER MARKET, BY REGION, 2016–2019 (USD MILLION)

TABLE 262 MICRO MOBILE DATA CENTER MARKET, BY REGION, 2020–2025 (USD MILLION)

15 APPENDIX

15.1 DISCUSSION GUIDE

15.2 KNOWLEDGESTORE: MARKETSANDMARKETS' SUBSCRIPTION PORTAL

15.3 CUSTOMIZATION OPTIONS

15.4 RELATED REPORTS

15.5 AUTHOR DETAILS

About

Modular data center has redefined the way the traditional datacenters or computer center architectures implemented cooling, power supplies, and space infrastructure. It consists of standardized components, making it easier and cheaper to build, deploy and integrate/retrofit to any other datacenter at customer premises.

Modular data center supersede the legacy of traditional datacenter by offering flexibility, scalability, portability, reusability, smaller footprint, reduced deployment time, improved efficiency, and reduced total cost of ownership. The market for modular data center is emerging in recent times as a solution for data center infrastructure which can be deployed in relatively lesser time along with ultra-low Power Usage Effectiveness (PUE) efficiency, and can be transported anywhere by vendors providing flexibility, reliability, and scalability when compared to traditional data centers. The traditional brick and mortar data centers take more time to plan and set up data center infrastructure than the modular approach for data centers. It reduces complexity and can be customized to meet organization's data center needs being offered in various modules, i.e. IT, power, cooling, and generator. The modular data centers are pre-fabricated and most of the components are standardized, resulting in cheaper and easier installation than the traditional alternatives. The cost advantage offered by modular data center give them extra edge over existing data center infrastructure solution. The fully integrated modular containers provide full data center infrastructure with plug and play capability for data centers of all sizes.

The adoption of modular approach for data center have increased in recent years and is expected to grow at rapid pace in the future as well. The forecast period for modular data center is 2014-2019, taking 2014 as a base year throughout the research report. The modular data center market is expected to reshape the data center infrastructure market dramatically in future. The report identifies major drivers and restraints in the industry related to current acceptance of modular data center and the expected role of these modules in data center infrastructure in the future. The company profiles of major players in the ecosystem of modular data center are included in the report to provide

competitive insights.

Major players in the modular data center market are Cisco, HP, IBM, Dell, Schneider, SGI, and BladeRoom. The modular data center research report discusses the strategies and insights of the key vendors in the industry and also provides in-depth study of driving forces and challenges for the modular data center market. The report also analyzes global adoption trends and future growth potentials across different geographical regions.

MarketsandMarkets has segmented the global modular data center market by type, deployment size, industry vertical, and geographical region. The report also consists of MarketsandMarkets views of the key players and analysts insights on various developments that are taking place in the modular data center market space.

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