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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.

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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

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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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