

# **AI Cloud Infrastructure and Software Global Market Insights 2025, Analysis and Forecast to 2030, by Market Participants, Regions, Technology, Application, Product Type**

<https://marketpublishers.com/r/A2F97B645083EN.html>

Date: March 2025

Pages: 92

Price: US\$ 3,200.00 (Single User License)

ID: A2F97B645083EN

## **Abstracts**

### **AI Cloud Infrastructure and Software Market Summary**

#### **Introduction**

AI Cloud Infrastructure and Software refers to a suite of cloud-based technologies, including hardware, platforms, and applications, designed to support artificial intelligence (AI) workloads, enabling data processing, machine learning, and AI-driven decision-making. Available in types such as Infrastructure Service (e.g., computing power and storage), Managed Software Service (e.g., AI platforms), and Application Software Service (e.g., AI-driven apps), these solutions cater to large enterprises and small and medium enterprises (SMEs). The industry operates within the broader cloud computing and AI market, characterized by its critical role in digital transformation, reliance on scalable computing resources, and rapid evolution driven by AI innovation. The market is propelled by increasing AI adoption across industries, demand for scalable computing, and advancements in generative AI, particularly in regions with strong tech ecosystems, but faces challenges from high costs, data privacy concerns, and competition from on-premises solutions.

#### **Market Size and Growth Forecast**

The global AI Cloud Infrastructure and Software market is estimated at approximately USD 250 to 330 billion in 2025, with a projected compound annual growth rate (CAGR) of 10.2% to 16.8% from 2025 to 2030, reaching USD 410 to 650 billion by 2030. This robust growth reflects surging demand for AI-driven solutions, supported by technological advancements and enterprise digitization, though moderated by cost and

regulatory pressures.

### Regional Analysis

**North America:** Holding an estimated 40-45% of the market share, North America grows at 10-15%. The United States dominates with widespread adoption by large enterprises, driven by a mature tech ecosystem, significant cloud investments, and leadership in AI innovation. Trends focus on generative AI and hybrid cloud solutions, with companies leveraging Infrastructure Services for scalable computing and Application Software Services for customer-facing AI tools.

**Europe:** Accounting for 20-25% of the market share, Europe grows at 9-13%. Germany, the UK, and France lead, supported by strong industrial and tech sectors. Germany emphasizes Managed Software Services for manufacturing AI, while the UK focuses on Application Software Services in finance. Market trends highlight GDPR compliance and sustainable cloud practices, with growth tempered by regulatory complexity.

**Asia Pacific:** Representing 25-30% of the market share, this region grows at 12-18%. China and India dominate due to rapid digitization and AI adoption, with Japan and South Korea excelling in tech innovation. China's large enterprises drive Infrastructure Service demand, while India targets SMEs with Managed Software Services. Trends emphasize cost-effective cloud AI and government-led digital initiatives, with China's scale supporting global competition.

**Rest of the World:** With a 10-15% share, this region grows at 10-16%. Brazil and the UAE lead with enterprise AI adoption, fueled by digital transformation. Brazil focuses on Application Software Services in agriculture, while the UAE targets Infrastructure Services for smart cities. Trends prioritize scalable, affordable AI solutions to support emerging tech markets.

### Application Analysis

**Large Enterprises:** Expected to grow at 10-15%, dominant application (70-75% share). Used for complex AI workloads, trends focus on scalable Infrastructure Services and AI-driven analytics, driven by digital transformation in industries like finance and healthcare.

**Small and Medium Enterprises (SMEs):** Projected at 12-18%, growing application (25-30% share). Leverages Managed Software Services for cost-effective AI, trends emphasize easy-to-deploy Application Software Services for operational efficiency, supporting SME digitization.

### Product Type Analysis

**Infrastructure Service:** Expected to grow at 10-16%, key type (40-45% share). Provides computing and storage, trends focus on GPU-intensive AI workloads and hybrid cloud

adoption, driven by enterprise scalability needs.

**Managed Software Service:** Projected at 11-17%, growing type (30-35% share). Offers AI platforms, trends emphasize pre-built models and ease of use for SMEs, supporting rapid AI deployment.

**Application Software Service:** Anticipated at 10-15%, significant type (25-30% share). Delivers AI-driven apps, trends target customer-facing solutions like chatbots, fueled by generative AI advancements.

### Key Market Players

**Amazon:** A leader in Infrastructure Services with AWS.

**Google:** Specializes in AI platforms and Application Software.

**IBM:** Offers Managed Software Services for enterprises.

**Microsoft:** Provides comprehensive Azure AI solutions.

**Oracle:** Focuses on scalable cloud AI infrastructure.

**Huawei:** Supplies cost-effective AI cloud services.

**Alibaba:** Dominates in Asia with Infrastructure Services.

**Salesforce:** Innovates in Application Software Services.

**Wipro:** Offers tailored AI cloud solutions.

**CoreWeave:** Specializes in GPU-heavy Infrastructure Services.

These companies compete on scalability, cost, and AI capabilities.

### Porter's Five Forces Analysis

**Threat of New Entrants:** Medium; high capital and expertise barriers deter entry, though growing AI demand offers opportunities for niche cloud providers.

**Threat of Substitutes:** Medium; on-premises AI competes in security-sensitive sectors, but cloud's scalability sustains demand.

**Bargaining Power of Buyers:** High; enterprises negotiate due to large contracts and customization needs, particularly in competitive markets like North America.

**Bargaining Power of Suppliers:** Medium; reliance on hardware and software providers gives leverage, offset by diversified partnerships.

**Competitive Rivalry:** High; players compete on AI performance, cost, and integration, driving rapid innovation and market consolidation.

### Market Opportunities and Challenges

#### Opportunities:

-The widespread adoption of AI by enterprises in North America and Asia Pacific offers a dynamic opportunity for cloud infrastructure services, as businesses seek scalable computing power for complex workloads. Providers can capitalize by delivering robust, GPU-intensive solutions, positioning themselves as essential partners in regions leading

AI innovation.

-The push for digitization among small and medium enterprises (SMEs) globally creates a promising landscape for managed software services, particularly in India and Europe. Offering user-friendly, cost-effective AI platforms allows companies to empower SMEs with operational efficiency, tapping into a market eager for accessible technology solutions.

-The rise of generative AI advancements fuels demand for application software services, especially in North America and Europe, where customer-facing tools like chatbots are gaining traction. Innovating with AI-driven applications positions providers to lead in this creative and competitive space, aligning with evolving business needs.

Challenges:

-The significant expense of establishing AI cloud infrastructure poses a formidable challenge, particularly in regions like the Rest of the World where financial resources are limited. High setup costs can slow adoption unless providers develop flexible, affordable offerings, a hurdle that looms large in emerging markets.

-Data privacy concerns, especially in Europe and North America, cast a shadow over cloud AI adoption, as regulatory frameworks like GDPR and CCPA demand stringent protections. This necessitates substantial investments in security, complicating efforts to balance innovation with compliance in highly regulated environments.

-The competition from on-premises AI solutions creates a persistent challenge, particularly in industries prioritizing security over scalability, such as finance. To maintain their edge, cloud providers must highlight unmatched flexibility and performance, a task that intensifies as buyers weigh cost and control in their technology choices.

## Contents

### **CHAPTER 1 EXECUTIVE SUMMARY**

### **CHAPTER 2 ABBREVIATION AND ACRONYMS**

### **CHAPTER 3 PREFACE**

- 3.1 Research Scope
- 3.2 Research Sources
  - 3.2.1 Data Sources
  - 3.2.2 Assumptions
- 3.3 Research Method
- Chapter Four Market Landscape
- 4.1 Market Overview
- 4.2 Classification/Types
- 4.3 Application/End Users

### **CHAPTER 5 MARKET TREND ANALYSIS**

- 5.1 Introduction
- 5.2 Drivers
- 5.3 Restraints
- 5.4 Opportunities
- 5.5 Threats

### **CHAPTER 6 INDUSTRY CHAIN ANALYSIS**

- 6.1 Upstream/Suppliers Analysis
- 6.2 Ai Cloud Infrastructure and Software Analysis
  - 6.2.1 Technology Analysis
  - 6.2.2 Cost Analysis
  - 6.2.3 Market Channel Analysis
- 6.3 Downstream Buyers/End Users

### **CHAPTER 7 LATEST MARKET DYNAMICS**

- 7.1 Latest News
- 7.2 Merger and Acquisition

7.3 Planned/Future Project

7.4 Policy Dynamics

## **CHAPTER 8 HISTORICAL AND FORECAST AI CLOUD INFRASTRUCTURE AND SOFTWARE MARKET IN NORTH AMERICA (2020-2030)**

8.1 Ai Cloud Infrastructure and Software Market Size

8.2 Ai Cloud Infrastructure and Software Market by End Use

8.3 Competition by Players/Suppliers

8.4 Ai Cloud Infrastructure and Software Market Size by Type

8.5 Key Countries Analysis

8.5.1 United States

8.5.2 Canada

8.5.3 Mexico

## **CHAPTER 9 HISTORICAL AND FORECAST AI CLOUD INFRASTRUCTURE AND SOFTWARE MARKET IN SOUTH AMERICA (2020-2030)**

9.1 Ai Cloud Infrastructure and Software Market Size

9.2 Ai Cloud Infrastructure and Software Market by End Use

9.3 Competition by Players/Suppliers

9.4 Ai Cloud Infrastructure and Software Market Size by Type

9.5 Key Countries Analysis

9.5.1 Brazil

9.5.2 Argentina

9.5.3 Chile

9.5.4 Peru

## **CHAPTER 10 HISTORICAL AND FORECAST AI CLOUD INFRASTRUCTURE AND SOFTWARE MARKET IN ASIA & PACIFIC (2020-2030)**

10.1 Ai Cloud Infrastructure and Software Market Size

10.2 Ai Cloud Infrastructure and Software Market by End Use

10.3 Competition by Players/Suppliers

10.4 Ai Cloud Infrastructure and Software Market Size by Type

10.5 Key Countries Analysis

10.5.1 China

10.5.2 India

10.5.3 Japan

- 10.5.4 South Korea
- 10.5.5 Southeast Asia
- 10.5.6 Australia

## **CHAPTER 11 HISTORICAL AND FORECAST AI CLOUD INFRASTRUCTURE AND SOFTWARE MARKET IN EUROPE (2020-2030)**

- 11.1 Ai Cloud Infrastructure and Software Market Size
- 11.2 Ai Cloud Infrastructure and Software Market by End Use
- 11.3 Competition by Players/Suppliers
- 11.4 Ai Cloud Infrastructure and Software Market Size by Type
- 11.5 Key Countries Analysis
  - 11.5.1 Germany
  - 11.5.2 France
  - 11.5.3 United Kingdom
  - 11.5.4 Italy
  - 11.5.5 Spain
  - 11.5.6 Belgium
  - 11.5.7 Netherlands
  - 11.5.8 Austria
  - 11.5.9 Poland
  - 11.5.10 Russia

## **CHAPTER 12 HISTORICAL AND FORECAST AI CLOUD INFRASTRUCTURE AND SOFTWARE MARKET IN MEA (2020-2030)**

- 12.1 Ai Cloud Infrastructure and Software Market Size
- 12.2 Ai Cloud Infrastructure and Software Market by End Use
- 12.3 Competition by Players/Suppliers
- 12.4 Ai Cloud Infrastructure and Software Market Size by Type
- 12.5 Key Countries Analysis
  - 12.5.1 Egypt
  - 12.5.2 Israel
  - 12.5.3 South Africa
  - 12.5.4 Gulf Cooperation Council Countries
  - 12.5.5 Turkey

## **CHAPTER 13 SUMMARY FOR GLOBAL AI CLOUD INFRASTRUCTURE AND SOFTWARE MARKET (2020-2025)**



- 13.1 Ai Cloud Infrastructure and Software Market Size
- 13.2 Ai Cloud Infrastructure and Software Market by End Use
- 13.3 Competition by Players/Suppliers
- 13.4 Ai Cloud Infrastructure and Software Market Size by Type

## **CHAPTER 14 GLOBAL AI CLOUD INFRASTRUCTURE AND SOFTWARE MARKET FORECAST (2025-2030)**

- 14.1 Ai Cloud Infrastructure and Software Market Size Forecast
- 14.2 Ai Cloud Infrastructure and Software Application Forecast
- 14.3 Competition by Players/Suppliers
- 14.4 Ai Cloud Infrastructure and Software Type Forecast

## **CHAPTER 15 ANALYSIS OF GLOBAL KEY VENDORS**

- 15.1 Amazon
  - 15.1.1 Company Profile
  - 15.1.2 Main Business and AI Cloud Infrastructure and Software Information
  - 15.1.3 SWOT Analysis of Amazon
  - 15.1.4 Amazon AI Cloud Infrastructure and Software Revenue, Gross Margin and Market Share (2020-2025)
- 15.2 Google
  - 15.2.1 Company Profile
  - 15.2.2 Main Business and AI Cloud Infrastructure and Software Information
  - 15.2.3 SWOT Analysis of Google
  - 15.2.4 Google AI Cloud Infrastructure and Software Revenue, Gross Margin and Market Share (2020-2025)
- 15.3 IBM
  - 15.3.1 Company Profile
  - 15.3.2 Main Business and AI Cloud Infrastructure and Software Information
  - 15.3.3 SWOT Analysis of IBM
  - 15.3.4 IBM AI Cloud Infrastructure and Software Revenue, Gross Margin and Market Share (2020-2025)
- 15.4 Microsoft
  - 15.4.1 Company Profile
  - 15.4.2 Main Business and AI Cloud Infrastructure and Software Information
  - 15.4.3 SWOT Analysis of Microsoft
  - 15.4.4 Microsoft AI Cloud Infrastructure and Software Revenue, Gross Margin and



## Market Share (2020-2025)

### 15.5 Oracle

#### 15.5.1 Company Profile

#### 15.5.2 Main Business and AI Cloud Infrastructure and Software Information

#### 15.5.3 SWOT Analysis of Oracle

#### 15.5.4 Oracle AI Cloud Infrastructure and Software Revenue, Gross Margin and

## Market Share (2020-2025)

### 15.6 Huawei

#### 15.6.1 Company Profile

#### 15.6.2 Main Business and AI Cloud Infrastructure and Software Information

#### 15.6.3 SWOT Analysis of Huawei

#### 15.6.4 Huawei AI Cloud Infrastructure and Software Revenue, Gross Margin and

## Market Share (2020-2025)

### 15.7 Alibaba

#### 15.7.1 Company Profile

#### 15.7.2 Main Business and AI Cloud Infrastructure and Software Information

#### 15.7.3 SWOT Analysis of Alibaba

#### 15.7.4 Alibaba AI Cloud Infrastructure and Software Revenue, Gross Margin and

## Market Share (2020-2025)

### 15.8 Salesforce

#### 15.8.1 Company Profile

#### 15.8.2 Main Business and AI Cloud Infrastructure and Software Information

#### 15.8.3 SWOT Analysis of Salesforce

#### 15.8.4 Salesforce AI Cloud Infrastructure and Software Revenue, Gross Margin and

## Market Share (2020-2025)

Please ask for sample pages for full companies list

## Tables and Figures

### Table Abbreviation and Acronyms

### Table Research Scope of Ai Cloud Infrastructure and Software Report

### Table Data Sources of Ai Cloud Infrastructure and Software Report

### Table Major Assumptions of Ai Cloud Infrastructure and Software Report

### Figure Market Size Estimated Method

### Figure Major Forecasting Factors

### Figure Ai Cloud Infrastructure and Software Picture

### Table Ai Cloud Infrastructure and Software Classification

### Table Ai Cloud Infrastructure and Software Applications

### Table Drivers of Ai Cloud Infrastructure and Software Market

### Table Restraints of Ai Cloud Infrastructure and Software Market

### Table Opportunities of Ai Cloud Infrastructure and Software Market

Table Threats of Ai Cloud Infrastructure and Software Market

Table Covid-19 Impact For Ai Cloud Infrastructure and Software Market

Table Raw Materials Suppliers

Table Different Production Methods of Ai Cloud Infrastructure and Software

Table Cost Structure Analysis of Ai Cloud Infrastructure and Software

Table Key End Users

Table Latest News of Ai Cloud Infrastructure and Software Market

Table Merger and Acquisition

Table Planned/Future Project of Ai Cloud Infrastructure and Software Market

Table Policy of Ai Cloud Infrastructure and Software Market

Table 2020-2030 North America Ai Cloud Infrastructure and Software Market Size

Figure 2020-2030 North America Ai Cloud Infrastructure and Software Market Size and CAGR

Table 2020-2030 North America Ai Cloud Infrastructure and Software Market Size by Application

Table 2020-2025 North America Ai Cloud Infrastructure and Software Key Players Revenue

Table 2020-2025 North America Ai Cloud Infrastructure and Software Key Players Market Share

Table 2020-2030 North America Ai Cloud Infrastructure and Software Market Size by Type

Table 2020-2030 United States Ai Cloud Infrastructure and Software Market Size

Table 2020-2030 Canada Ai Cloud Infrastructure and Software Market Size

Table 2020-2030 Mexico Ai Cloud Infrastructure and Software Market Size

Table 2020-2030 South America Ai Cloud Infrastructure and Software Market Size

Figure 2020-2030 South America Ai Cloud Infrastructure and Software Market Size and CAGR

Table 2020-2030 South America Ai Cloud Infrastructure and Software Market Size by Application

Table 2020-2025 South America Ai Cloud Infrastructure and Software Key Players Revenue

Table 2020-2025 South America Ai Cloud Infrastructure and Software Key Players Market Share

Table 2020-2030 South America Ai Cloud Infrastructure and Software Market Size by Type

Table 2020-2030 Brazil Ai Cloud Infrastructure and Software Market Size

Table 2020-2030 Argentina Ai Cloud Infrastructure and Software Market Size

Table 2020-2030 Chile Ai Cloud Infrastructure and Software Market Size

Table 2020-2030 Peru Ai Cloud Infrastructure and Software Market Size

Table 2020-2030 Asia & Pacific Ai Cloud Infrastructure and Software Market Size

Figure 2020-2030 Asia & Pacific Ai Cloud Infrastructure and Software Market Size and CAGR

Table 2020-2030 Asia & Pacific Ai Cloud Infrastructure and Software Market Size by Application

Table 2020-2025 Asia & Pacific Ai Cloud Infrastructure and Software Key Players Revenue

Table 2020-2025 Asia & Pacific Ai Cloud Infrastructure and Software Key Players Market Share

Table 2020-2030 Asia & Pacific Ai Cloud Infrastructure and Software Market Size by Type

Table 2020-2030 China Ai Cloud Infrastructure and Software Market Size

Table 2020-2030 India Ai Cloud Infrastructure and Software Market Size

Table 2020-2030 Japan Ai Cloud Infrastructure and Software Market Size

Table 2020-2030 South Korea Ai Cloud Infrastructure and Software Market Size

Table 2020-2030 Southeast Asia Ai Cloud Infrastructure and Software Market Size

Table 2020-2030 Australia Ai Cloud Infrastructure and Software Market Size

Table 2020-2030 Europe Ai Cloud Infrastructure and Software Market Size

Figure 2020-2030 Europe Ai Cloud Infrastructure and Software Market Size and CAGR

Table 2020-2030 Europe Ai Cloud Infrastructure and Software Market Size by Application

Table 2020-2025 Europe Ai Cloud Infrastructure and Software Key Players Revenue

Table 2020-2025 Europe Ai Cloud Infrastructure and Software Key Players Market Share

Table 2020-2030 Europe Ai Cloud Infrastructure and Software Market Size by Type

Table 2020-2030 Germany Ai Cloud Infrastructure and Software Market Size

Table 2020-2030 France Ai Cloud Infrastructure and Software Market Size

Table 2020-2030 United Kingdom Ai Cloud Infrastructure and Software Market Size

Table 2020-2030 Italy Ai Cloud Infrastructure and Software Market Size

Table 2020-2030 Spain Ai Cloud Infrastructure and Software Market Size

Table 2020-2030 Belgium Ai Cloud Infrastructure and Software Market Size

Table 2020-2030 Netherlands Ai Cloud Infrastructure and Software Market Size

Table 2020-2030 Austria Ai Cloud Infrastructure and Software Market Size

Table 2020-2030 Poland Ai Cloud Infrastructure and Software Market Size

Table 2020-2030 Russia Ai Cloud Infrastructure and Software Market Size

Table 2020-2030 MEA Ai Cloud Infrastructure and Software Market Size

Figure 2020-2030 MEA Ai Cloud Infrastructure and Software Market Size and CAGR

Table 2020-2030 MEA Ai Cloud Infrastructure and Software Market Size by Application

Table 2020-2025 MEA Ai Cloud Infrastructure and Software Key Players Revenue

Table 2020-2025 MEA Ai Cloud Infrastructure and Software Key Players Market Share

Table 2020-2030 MEA Ai Cloud Infrastructure and Software Market Size by Type

Table 2020-2030 Egypt Ai Cloud Infrastructure and Software Market Size

Table 2020-2030 Israel Ai Cloud Infrastructure and Software Market Size

Table 2020-2030 South Africa Ai Cloud Infrastructure and Software Market Size

Table 2020-2030 Gulf Cooperation Council Countries Ai Cloud Infrastructure and Software Market Size

Table 2020-2030 Turkey Ai Cloud Infrastructure and Software Market Size

Table 2020-2025 Global Ai Cloud Infrastructure and Software Market Size by Region

Table 2020-2025 Global Ai Cloud Infrastructure and Software Market Size Share by Region

Table 2020-2025 Global Ai Cloud Infrastructure and Software Market Size by Application

Table 2020-2025 Global Ai Cloud Infrastructure and Software Market Share by Application

Table 2020-2025 Global Ai Cloud Infrastructure and Software Key Vendors Revenue

Figure 2020-2025 Global Ai Cloud Infrastructure and Software Market Size and Growth Rate

Table 2020-2025 Global Ai Cloud Infrastructure and Software Key Vendors Market Share

Table 2020-2025 Global Ai Cloud Infrastructure and Software Market Size by Type

Table 2020-2025 Global Ai Cloud Infrastructure and Software Market Share by Type

Table 2025-2030 Global Ai Cloud Infrastructure and Software Market Size by Region

Table 2025-2030 Global Ai Cloud Infrastructure and Software Market Size Share by Region

Table 2025-2030 Global Ai Cloud Infrastructure and Software Market Size by Application

Table 2025-2030 Global Ai Cloud Infrastructure and Software Market Share by Application

Table 2025-2030 Global Ai Cloud Infrastructure and Software Key Vendors Revenue

Figure 2025-2030 Global Ai Cloud Infrastructure and Software Market Size and Growth Rate

Table 2025-2030 Global Ai Cloud Infrastructure and Software Key Vendors Market Share

Table 2025-2030 Global Ai Cloud Infrastructure and Software Market Size by Type

Table 2025-2030 Ai Cloud Infrastructure and Software Global Market Share by Type

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