

IT Infrastructure Market Forecasts to 2032 – Global Analysis By Component (Hardware, Software and Services), Deployment Model, Enterprise Size, End User and By Geography

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Abstracts

According to Statistics MRC, the Global IT Infrastructure Market is accounted for \$120.15 billion in 2025 and is expected to reach \$241.69 billion by 2032 growing at a CAGR of 10.5% during the forecast period. IT infrastructure constitutes the integrated set of hardware, software, networking resources, and services essential for running and managing IT functions in a business. It includes tangible components like servers, storage systems, networking devices, and data centers, along with intangible elements such as cloud platforms, virtualized systems, and software-driven networks. Strong IT infrastructure provides consistent connectivity, efficient information handling, and dependable performance, supporting organizational processes, improving efficiency, and safeguarding data. As digital transformation accelerates, contemporary IT infrastructure prioritizes flexibility, scalability, automation, and cloud-based solutions, allowing businesses to adapt quickly to technological changes and meet dynamic operational requirements while maintaining seamless and secure IT services.

According to IDC, spending on compute and storage infrastructure products for cloud deployments grew 115.3% year-over-year in Q3 2024, reaching \$57.3 billion. This surge was driven by AI and high-performance computing investments.

Market Dynamics:

Driver:

Increasing data center demand

The increasing generation of data by businesses and consumers is significantly boosting the need for sophisticated data centers, stimulating growth in the IT infrastructure market. Companies need scalable and resilient systems to store, manage, and analyze large volumes of both structured and unstructured data. The rise of artificial intelligence, IoT, and big data analytics further intensifies the demand for high-performance computing environments. Enterprises are also emphasizing energy-efficient and sustainable data centers to cut costs and minimize environmental impact. Continuous advancements in storage, networking, and server technologies are prompting organizations to invest in modern IT infrastructure capable of supporting complex, data-driven operations efficiently.

Restraint:

High deployment costs

High upfront costs for implementing IT infrastructure remain a major hurdle in market growth. Establishing modern servers, storage solutions, network devices, and data centers demands significant financial investment, which can be prohibitive for small and medium enterprises. The process of integrating existing legacy systems with advanced technologies often increases complexity and expenditure. Ongoing expenses, including maintenance, upgrades, and energy usage, further raise the total cost of ownership, making companies hesitant to invest heavily. This financial burden slows adoption, particularly in emerging markets. Consequently, despite rising interest in modern IT systems, the substantial deployment costs continue to restrict rapid expansion of the IT infrastructure market.

Opportunity:

Increasing adoption of cloud and hybrid IT solutions

The growing use of cloud and hybrid IT environments offers major growth prospects for the IT infrastructure market. Organizations adopt cloud platforms to gain scalability, agility, and cost savings while retaining control of essential on-premises systems. Hybrid setups enable efficient workload allocation, performance optimization, and adherence to compliance regulations. The expanding interest in multi-cloud strategies further stimulates investments in infrastructure that can seamlessly connect different cloud services. Cloud-based solutions also enhance remote work capabilities, disaster recovery, and rapid application deployment. These developments create opportunities

for IT service providers to deliver innovative tools, solutions, and managed services that help businesses enhance operational efficiency and strengthen overall IT performance.

Threat:

Rapid technology obsolescence

The rapid pace of technological change presents a significant threat to the IT infrastructure market. With continuous innovations in servers, storage, networking, and cloud platforms, existing infrastructure can quickly become outdated. Organizations must frequently upgrade or replace systems to stay competitive, driving up costs and complicating financial planning. Older infrastructure may also lack compatibility with modern applications, AI, or analytics platforms, affecting operational efficiency and innovation potential. Legacy systems can introduce security risks, further complicating management. The ongoing need to adopt emerging technologies can strain resources, limit willingness to invest in long-term projects, and create market uncertainty, posing challenges for sustainable growth in IT infrastructure.

Covid-19 Impact:

The COVID-19 outbreak significantly influenced the IT infrastructure market. Lockdowns and the rise of remote work prompted businesses to quickly invest in cloud platforms, virtual collaboration tools, and robust IT systems to ensure operational continuity. This sudden transition to digital workflows increased the need for servers, storage devices, networking hardware, and cloud-based infrastructure solutions. At the same time, supply chain interruptions and manufacturing delays temporarily hindered infrastructure deployment. The pandemic highlighted the critical importance of scalable, reliable, and secure IT infrastructure to support remote operations and digital initiatives. Consequently, while COVID-19 posed challenges, it also accelerated the adoption of modern IT infrastructure technologies across industries.

The hardware segment is expected to be the largest during the forecast period

The hardware segment is expected to account for the largest market share during the forecast period, reflecting the critical importance of physical components in enabling IT operations. Core elements like servers, storage systems, networking devices, and data center equipment serve as the backbone for all software solutions and IT services. Organizations continue prioritizing investments in high-performance, reliable, and energy-efficient hardware to maintain system efficiency and scalability. Rising

requirements for data storage, computational capacity, and network connectivity further fuel growth in this segment. Frequent hardware upgrades and replacements, driven by technological advancements, reinforce its leading position, making the hardware segment the primary contributor to overall market share and revenue within the IT infrastructure industry.

The cloud infrastructure segment is expected to have the highest CAGR during the forecast period

Over the forecast period, the cloud infrastructure segment is predicted to witness the highest growth rate, driven by widespread adoption of cloud solutions across various sectors. Companies are increasingly turning to public, private, and hybrid cloud platforms to gain scalability, flexibility, and cost savings while facilitating remote work and supporting digital transformation efforts. Cloud infrastructure provides instant access to computing power, storage, and networking capabilities, reducing dependence on traditional on-premises setups. Rising interest in multi-cloud strategies and the integration of advanced services like AI and analytics further propels its expansion. As organizations prioritize agility, efficiency, and seamless collaboration, cloud infrastructure outperforms other deployment models, achieving the highest growth rate in the market.

Region with largest share:

During the forecast period, the North America region is expected to hold the largest market share, fueled by the presence of top technology firms, extensive data center networks, and early adoption of advanced IT solutions. Substantial investments in servers, networking, and cloud infrastructure support ongoing digital transformation across multiple industries. The growing use of AI, big data analytics, and enterprise software further strengthens demand. A highly skilled workforce, supportive government initiatives, and a mature technology ecosystem reinforce the region's dominance. Frequent infrastructure upgrades, adoption of hybrid and multi-cloud models, and emphasis on scalable, secure IT systems ensure North America remains at the forefront of the global IT infrastructure market, holding the largest market share.

Region with highest CAGR:

Over the forecast period, the Asia Pacific region is anticipated to exhibit the highest CAGR, driven by rapid digital adoption, rising cloud usage, and increased investments in modern IT solutions. Key markets including China, India, and Japan are seeing

growing demand for data centers, networking systems, and storage infrastructure to support business and government operations. The expansion of IoT, AI, and edge computing further boosts the need for robust IT infrastructure. Supportive government policies, raising IT budgets, and a tech-savvy workforce accelerate growth. These factors, combined with the region's rapid technological adoption and enterprise-driven demand, make Asia-Pacific the fastest-growing market in the global IT infrastructure sector.

Key players in the market

Some of the key players in IT Infrastructure Market include Tata Consultancy Services, Infosys, Wipro, HCLTech, Cognizant, Q3 Technologies, Virtusa, Datacipher, Value Point Systems, Kyndryl, Accenture plc, Amazon Web Services (AWS), Microsoft Corporation, IBM Corporation and Cisco Systems, Inc.

Key Developments:

In November 2025, Tata Consultancy Services (TCS) has won a five-year deal to drive cloud and generative artificial intelligence (GenAI)-led modernisation for German multinational SAP. Under the deal, whose financials were not disclosed, TCS will help SAP in streamlining its IT landscape, enabling seamless operations, and strengthening AI-led capabilities. The collaboration will deliver faster development cycles and lower total cost of ownership.

In November 2025, IBM and Atruvia AG have sealed a long-term collaboration that paves the way for sustainable and state-of-the-art IT platforms for the banking of tomorrow. Atruvia will use IBM z17, which was announced earlier this year, as a cornerstone supports its mission critical operations including the core banking system.

In November 2025, Amazon Web Services (AWS) has signed a \$38 billion deal with OpenAI to supply computing power driven by Nvidia chips. The seven-year agreement marks one of the largest cloud infrastructure deals in the history of artificial intelligence (AI) and signals OpenAI's growing demand for high-performance computing as it scales up operations globally.

Components Covered:

Hardware

Software

Services

Deployment Models Covered:

On-Premises

Cloud Infrastructure

Edge Infrastructure

Enterprise Sizes Covered:

Small & Medium Enterprises (SMEs)

Large Enterprises

End Users Covered:

Telecom Operators

IT Service Providers

BFSI

Healthcare

Manufacturing

Retail & E-commerce

Government & Defense

Energy & Utilities

Other End Users

Regions Covered:

North America

US

Canada

Mexico

Europe

Germany

UK

Italy

France

Spain

Rest of Europe

Asia Pacific

Japan

China

India

Australia

New Zealand

South Korea

Rest of Asia Pacific

South America

Argentina

Brazil

Chile

Rest of South America

Middle East & Africa

Saudi Arabia

UAE

Qatar

South Africa

Rest of Middle East & Africa

What our report offers:

- Market share assessments for the regional and country-level segments
- Strategic recommendations for the new entrants
- Covers Market data for the years 2024, 2025, 2026, 2028, and 2032
- Market Trends (Drivers, Constraints, Opportunities, Threats, Challenges, Investment Opportunities, and recommendations)
- Strategic recommendations in key business segments based on the market estimations
- Competitive landscaping mapping the key common trends
- Company profiling with detailed strategies, financials, and recent developments
- Supply chain trends mapping the latest technological advancements

Free Customization Offerings:

All the customers of this report will be entitled to receive one of the following free customization options:

Company Profiling

Comprehensive profiling of additional market players (up to 3)

SWOT Analysis of key players (up to 3)

Regional Segmentation

Market estimations, Forecasts and CAGR of any prominent country as per the client's interest (Note: Depends on feasibility check)

Competitive Benchmarking

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