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Software-Defined Data Center Market Forecasts to 2030 – Global Analysis By Component (Solutions and Services), Deployment Model, Enterprise Size, End User and By Geography

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Abstracts

According to Stratistics MRC, the Global Software-Defined Data Center Market is accounted for $82.7 billion in 2024 and is expected to reach $259.6 billion by 2030 growing at a CAGR of 21% during the forecast period. A software defined data center (SDDC) is an IT infrastructure in which all data center resources, including storage, compute, networking, and security, are virtualized and delivered as a service through software. Management and control are automated through centralized software for maximum flexibility, scalability, and efficiency. SDDC takes hardware out of business, enabling dynamic distribution systems to handle changing workloads, thereby optimizing performance, reducing costs, and simplifying data center management.

According to the Cloud Native Computing Foundation (CNCF) 2023 survey, public cloud was the preferred choice for organizations, with 56% of organizations adopting multi-cloud solutions.

Market Dynamics:

Driver:

Increased adoption of cloud computing

The growing adoption of cloud computing is a key driver for the software-defined data center (SDDC) market. As businesses increasingly shift to cloud-based infrastructures, the demand for scalable, flexible, and cost-effective data center solutions rises. SDDCs

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enable seamless integration with cloud environments, offering dynamic resource allocation and centralized management. This trend is further fueled by the proliferation of hybrid and multi-cloud strategies, which require agile and automated IT infrastructures to meet evolving business needs efficiently.

Restraint:

High initial investment

The high initial investment required for deploying SDDCs acts as a major restraint for market growth. Costs associated with advanced software solutions, skilled personnel, and infrastructure upgrades can be prohibitive for small enterprises. Additionally, transitioning from traditional data centers to software-defined architectures involves significant capital expenditure and operational disruptions. Despite long-term benefits such as cost savings and efficiency, these upfront costs deter many organizations from adopting SDDC solutions at scale.

Opportunity:

Expansion of edge computing

The expansion of edge computing presents a significant growth opportunity for the SDDC market. As industries adopt edge computing to process data closer to its source, the need for flexible and scalable data center solutions increases. SDDCs complement edge computing by enabling real-time data processing and efficient resource management across distributed environments. This synergy supports applications like IoT, autonomous vehicles, and smart cities, driving further adoption of software-defined architectures.

Threat:

Cybersecurity risks

Cybersecurity risks pose a significant threat to the SDDC market. The virtualized nature of SDDCs increases vulnerability to cyberattacks, such as data breaches and ransomware. Ensuring robust security measures while maintaining operational efficiency remains a challenge for organizations. Additionally, compliance with stringent data protection regulations like GDPR or CCPA adds complexity to managing SDDC environments. Failure to address these risks can lead to financial losses and

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reputational damage.

Covid-19 Impact:

The COVID-19 pandemic accelerated the adoption of SDDCs as organizations shifted to remote work models and digital operations. The demand for scalable and resilient IT infrastructures surged, driving reliance on virtualized environments. SDDCs enabled businesses to ensure seamless data access and management during disruptions. This trend highlighted the importance of flexible IT solutions in maintaining business continuity, fostering long-term growth in the market.

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

The solutions segment is expected to account for the largest market share during the forecast period due to its comprehensive offerings in software-defined networking (SDN), storage (SDS), and compute (SDC). These solutions enable organizations to virtualize their IT infrastructure, improving scalability, flexibility, and operational efficiency. Enterprises increasingly rely on these solutions to optimize performance while reducing hardware dependency. The rising demand for centralized management tools that streamline resource allocation further drives adoption in this segment.

The small and medium-sized enterprises (SMEs) segment is expected to have the highest CAGR during the forecast period

Over the forecast period, the small and medium-sized enterprises (SMEs) segment is expected to witness the highest CAGR due to rising digital transformation initiatives among smaller organizations. SMEs benefit from SDDCs' cost-effective infrastructure management capabilities, which reduce hardware expenses while enhancing scalability. Additionally, government support for start-ups and increased adoption of cloud-based services among SMEs contribute to this segment's rapid growth.

Region with largest share:

The North America region is anticipated to account for the largest market share during the forecast period due to its advanced technological infrastructure and early adoption of cloud computing. The presence of major tech companies and significant investments in IT innovation drive market growth in this region. Additionally, industries such as BFSI, healthcare, and retail increasingly rely on SDDCs for enhanced agility and scalability in their operations.

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Region with highest CAGR:

The Asia Pacific region is anticipated to register the highest growth rate over the forecast period owing to rapid digitalization in emerging economies like China and India. The growing adoption of IoT devices and edge computing further boosts demand for SDDC solutions. Favorable government policies supporting data center development, coupled with increasing investments in cloud technologies, fuel market expansion in this region.

Key players in the market

Some of the key players in Software-Defined Data Center Market include VMware, Inc., Microsoft Corporation, Cisco Systems, Inc., Hewlett Packard Enterprise (HPE), IBM Corporation, Oracle Corporation, Dell Technologies, Inc., Nutanix, Inc., Huawei Technologies Co., Ltd., SAP SE, Citrix Systems, Inc., NEC Corporation, Juniper Networks, Inc., Arista Networks, Inc., Fujitsu Limited, Extreme Networks, Inc., DataCore Software Corporation and Pivot3, Inc.

Key Developments:

In May 2024, Hewlett Packard Enterprise announced new solutions across the HPE GreenLake cloud to simplify how enterprises manage and optimize their storage, data and workloads across on-premise and public cloud environments.

In August 2023, VMware announced new capabilities and solutions, including the VMware Edge Cloud Orchestrator, to help customers accelerate their digital transformation at the edge during VMware Explore 2023.

In July 2023, Microsoft is reportedly ramping up its investment in data centers, doubling its new data center capacity this year, with over 500MW of additional space obtained since July 2023, totaling more than 5GW of IT capacity.

Components Covered:

- Solutions
- Services

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Deployment Models Covered:

- On-Premises
- Cloud-Based

Enterprise Sizes Covered:

- Small and Medium-Sized Enterprises (SMEs)
- Large Enterprises

End Users Covered:

- IT and Telecom
- Banking, Financial Services, and Insurance (BFSI)
- Government and Public Sector
- Healthcare
- Retail and E-Commerce
- Manufacturing
- Energy and Utilities
- Other End Users

Regions Covered:

- North America
  - US

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- 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

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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 2022, 2023, 2024, 2026, and 2030
- 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)

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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

Benchmarking of key players based on product portfolio, geographical presence, and strategic alliances

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Note: Tables for North America, Europe, APAC, South America, and Middle East & Africa Regions are also represented in the same manner as above.

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