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Converged Data Center Infrastructure Market – Global Industry Size, Share, Trends, Opportunity, and Forecast Segmented, By Deployment (Reference Architecture, Pre-Racked Configuration), By Component (Computational Devices, Storage Devices, Networking Devices), By Facility (On-Premises, Colocated Data Center), By Region, Competition 2018-2028.

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Abstracts

Global Converged Data Center Infrastructure Market was valued at USD 4.2 Billion in 2022 and is anticipated to project robust growth in the forecast period with a CAGR of 28.5% through 2028, Furthermore, the rising popularity of digital technology platforms such as social networking and knowledge platforms has increased demand for HI. According to an IBM Corporation analysis published in 2020, the total average cost of a data security breach was reported to be USD 3.86 million per breach. Personal and business penalties for data breaches are included in the fee. With the help of specific component applications, hyper-converged solutions are utilized to lessen the risk of data security breaches. It also comes with a high-security AMD processor package with security features that help to reduce security concerns.The use of IoT in numerous industries such as automotive, manufacturing, retail, transportation, and energy has been studied to drive the industry. IoT is used in various industries because it delivers real-time information, increases operational efficiency, optimizes production, and provides other benefits that enhance the industry's efficiency while also acting as a driving factor for the Hyper-Converged Infrastructure market. According to G.E, the use of Industrial IoT has a 44% impact on worldwide energy usage. As a result, the use of IoT in industries is expected to be a driving factor in the Hyper-Converged Infrastructure

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market during the projected period 2022-2027.The market is growing as a result of rising digital transformation in data centers adopting HI solutions. Using the compute storage network, the solutions are used for data center modernization and consolidation. It establishes a software-defined virtualized environment that makes scaling up and down data center capabilities easy. The solutions aid in improving performance and lowering operational costs. Rising investment in data center infrastructure development is likely to create market growth opportunities. For instance, In September 2021, Techno Electric and Engineering Company (TEECL) Power Infrastructure Company announced a USD 1 billion investment to build modern data centers in major Indian cities. Converged Data Center Infrastructure Market Segment Insights: Converged Data Center Infrastructure Deployment Insights The Converged Data Center Infrastructure Market segmentation, based on Deployment includes reference architecture, pre-racked configuration. The pre-racked configuration segment has the biggest market share. This is owing to the advantages of pre-racked infrastructure, such as faster deployment, greater scalability, and lower operational expenses. Pre-racked infrastructure also allows firms to focus on other key business operations while quickly deploying IT infrastructure. As a result, there is a growing demand for pre-racked infrastructure across a variety of businesses. Converged Data Center Infrastructure Component Insights The Converged Data Center Infrastructure Market segmentation, based on Component, includes computational devices, storage devices, networking devices. The converged data center infrastructure market is dominated by networking devices segment. This is due to the growing demand for high-speed data transport and the requirement for improved network connectivity across a wide range of businesses. Switches, routers, and gateways assist enterprises in managing and optimizing their network infrastructure, resulting in greater performance and less downtime.

Key Market Drivers

As a result of the increased pollution levels caused by diesel generators, many countries in the world are banning the use of diesel generators. Diesel generators are most commonly used for power backup in major industrial applications. During diesel burning, diesel generators emit carbon dioxide, carbon monoxide, nitrogen oxides (NOx), and particulates. In a diesel generator, for example, a liter of fuel produces 0.73 kg of pure carbon and 2.6 kg of carbon dioxide.

Converged Data Center Infrastructure Systems for Short-Term Blackouts To Reduce Air Pollution

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As a result, companies are using Converged Data Center Infrastructure systems for short-term blackouts to reduce air pollution in many industrial applications. Lead acid or lithium-ion batteries are often used to construct Converged Data Center Infrastructure systems. It is also important to note that generators do not provide an instant power supply, as they must be manually started. Computers and electronic equipment require instant backup power that isn't provided by generators.

The industrial revolution, known as Industry 4.0, has gained significant traction in the last couple of years. By mixing the Internet of Things (IoT), cloud computing, analytics, artificial intelligence, and machine learning into manufacturing facilities and operations, new technologies are revolutionizing manufacturing processes. As these operations are critical, many companies use an Converged Data Center Infrastructure to prevent data loss and production line downtime. They use an Converged Data Center Infrastructure to stabilize the power and streamline production during a power outage. Due to the factors mentioned above, the Converged Data Center Infrastructure (UPS) market is expected to grow the fastest during the forecast period.

As manufacturing automation has evolved with computer-based control systems, programming logic controllers, and process control applications, UPS systems are increasingly necessary for industrial facilities. In addition to providing backup power during a power outage, UPS systems protect equipment from power glitches such as power sags, surges, under voltages, overvoltages, line noise, frequency variations, switching transients, and harmonic distortions. Therefore, such an advantage related to the UPS systems has enhanced the Converged Data Center Infrastructure (UPS) market CAGR globally in recent years.

A number of technological advances in UPS battery systems, like lithium-ion (Li-ion) batteries that can operate at high temperatures, are expected to create immense opportunities for traditional data centers. UPS systems can also serve as backup systems when the electric grid fails, making them an excellent growth opportunity in the coming years, another factor driving the growth of the Converged Data Center Infrastructure (UPS) market revenue.

Key Market Challenges

Rapid Technological Advancements

One of the foremost challenges in the converged data center infrastructure market is the rapid pace of technological advancements. As technology evolves at an unprecedented

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rate, businesses must constantly adapt to remain competitive. Converged infrastructure solutions require consistent updates and improvements to keep up with these changes. Outdated infrastructure can become a bottleneck, leading to inefficiencies and security vulnerabilities. To address this challenge, vendors in this market need to invest heavily in research and development to ensure their solutions remain cutting-edge and compatible with the latest technologies.

Integration Complexity

While converged data center infrastructure promises simplicity and efficiency, integrating these systems into existing IT environments can be complex. Legacy systems, different vendor solutions, and custom applications can all present integration challenges. Ensuring that converged infrastructure works seamlessly with existing technology investments can be a significant undertaking. This challenge calls for expertise in system integration and comprehensive planning to minimize disruptions and downtime during the transition.

Scalability and Flexibility

As businesses grow and their IT requirements change, they need scalable and flexible solutions. Converged infrastructure should be able to accommodate expanding workloads and applications. Achieving this scalability and flexibility while maintaining optimal performance is not always straightforward. Vendors must design converged infrastructure solutions that can be easily expanded, allowing businesses to grow without overhauling their entire data center architecture. This requires careful planning and future-proofing to ensure the infrastructure can adapt to evolving needs.

Security Concerns

Security is a paramount concern for any data center, and converged infrastructure is no exception. As data becomes increasingly valuable and cyber threats more sophisticated, the market faces the challenge of ensuring the security of these integrated systems. A single vulnerability in a converged infrastructure solution could expose an organization to significant risks. Security protocols, encryption, and access controls need to be robustly integrated into these systems, and vendors must provide regular security updates to protect against emerging threats.

Converged infrastructure often leads to vendor lock-in, where businesses become heavily dependent on a single vendor for their integrated solution. This can limit

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flexibility and increase costs as organizations are tied to specific hardware and software. Overcoming this challenge requires choosing vendors carefully and ensuring that the benefits of convergence outweigh the potential disadvantages of vendor lock-in. It also calls for standardization efforts to promote interoperability among different vendors' converged infrastructure solutions.

Cost Management

While converged infrastructure solutions can improve efficiency, they can also be costly to implement and maintain. Organizations may face high initial investment costs, and ongoing operational expenses can be substantial. Proper cost management is essential to ensure that the benefits of convergence are not outweighed by financial constraints. This challenge involves identifying and reducing unnecessary costs, optimizing resource allocation, and exploring cost-effective solutions such as cloud-based infrastructure for certain workloads.

Skill Shortage

Managing converged data center infrastructure requires specialized skills. IT teams need to be well-versed in the design, deployment, and maintenance of these systems. Finding and retaining skilled personnel can be challenging, especially in a competitive job market. Training and development initiatives are crucial to address this challenge, as organizations need a workforce that can effectively manage converged infrastructure and address any issues that may arise.

Performance Optimization

Converged infrastructure is designed to provide high performance, but optimizing performance for specific workloads and applications can be challenging. Different workloads have varying requirements, and organizations need to fine-tune their converged infrastructure to meet these needs. Performance optimization involves continuous monitoring, analysis, and adjustment to ensure that the system operates at peak efficiency. This can be a resource-intensive and time-consuming process.

Data Management: Converged infrastructure solutions generate vast amounts of data. Managing and securing this data while ensuring compliance with data protection regulations is a significant challenge. Proper data management and data governance practices are crucial. Organizations must also consider data backup, disaster recovery, and data migration strategies, which can be complex in converged environments.

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Environmental Concerns

With the growing focus on sustainability and environmental responsibility, data centers, including converged infrastructure, face the challenge of minimizing their carbon footprint. These facilities consume significant energy, and cooling requirements add to the environmental impact. Addressing this challenge involves adopting energy-efficient hardware, optimizing cooling systems, and exploring renewable energy sources to power data centers.

In conclusion, the global converged data center infrastructure market is marked by numerous challenges that businesses and technology providers must navigate. From rapid technological advancements and integration complexity to scalability, security, and cost management, addressing these challenges is essential to leverage the benefits of converged infrastructure effectively. While these challenges are significant, they also present opportunities for innovation and growth in the market. Vendors and organizations that can successfully overcome these obstacles will be well-positioned to thrive in the evolving landscape of data center technology.

Key Market Trends

The Global Converged Data Center Infrastructure (UPS) market has been witnessing significant growth and transformation over the past several years. Several trends and factors have been shaping the UPS market on a global scale. Here are some of the prominent trends in the global UPS market:

Rising Demand for Data Centers

With the growth of cloud computing, IoT, and digital services, data centers have become a critical component of modern infrastructure. This has led to a substantial increase in the demand for UPS systems to ensure uninterrupted power supply for data centers.

Increasing Energy Efficiency: Energy efficiency is a top priority for businesses and organizations to reduce operational costs and environmental impact. Manufacturers are developing UPS systems with higher efficiency ratings, advanced battery management, and energy-saving features.

Growth of Modular UPS Systems: Modular UPS systems are gaining popularity due to

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their scalability and flexibility. They allow businesses to expand their power protection systems as needed, reducing upfront costs and making it easier to adapt to changing power requirements. Lithium-ion batteries are increasingly being adopted in UPS systems due to their longer lifespan, higher energy density, and reduced maintenance requirements compared to traditional lead-acid batteries.

Rise in Edge Computing

Edge computing, which involves processing data closer to the source (e.g., IoT devices), is gaining traction. This trend demands UPS solutions at the edge, contributing to market growth.

Focus on Sustainability: Environmental concerns are pushing companies to adopt sustainable practices, including the use of energy-efficient and eco-friendly UPS systems. Manufacturers are developing UPS units that can integrate with renewable energy sources.

Digitalization and Remote Monitoring: The integration of UPS systems with digital platforms and remote monitoring capabilities is becoming increasingly important. This allows for real-time monitoring, predictive maintenance, and swift issue resolution.

Increasing Adoption of Three-Phase UPS: Three-phase UPS systems are in high demand, especially in industries with heavy power requirements, such as manufacturing, healthcare, and data centers. They provide better power protection and distribution.

E-commerce and Retail Sector Demand: The growth of e-commerce and the increasing reliance on online retail have driven the need for UPS systems to ensure continuous operation during power outages, preventing financial losses and maintaining customer satisfaction. The COVID-19 pandemic highlighted the vulnerability of global supply chains. The UPS market has experienced disruptions in the supply of components, leading to delays in production and delivery.

Evolving Regulations and Standards

Governments and industry bodies are continually updating regulations and standards related to power quality and reliability. Manufacturers must stay abreast of these changes to ensure compliance.

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Resilience and Disaster Recovery: Businesses are increasingly investing in UPS systems to ensure business continuity and disaster recovery capabilities. UPS solutions play a vital role in protecting critical infrastructure during natural disasters or power grid failures.

Electrification of Transportation: The shift toward electric vehicles and charging infrastructure requires UPS systems to ensure uninterrupted charging, particularly in public charging stations.

Hybrid and Multi-Mode UPS

Hybrid and multi-mode UPS systems offer versatility by combining the benefits of online and line-interactive UPS. These systems provide excellent protection and efficiency, making them attractive options for various applications.

Increased Emphasis on Cybersecurity: As UPS systems become more integrated with digital infrastructure, there is a growing focus on cybersecurity. Ensuring the protection of UPS systems from cyberattacks is crucial for safeguarding critical infrastructure. The integration of UPS systems with smart grids is on the horizon, enabling dynamic load management, demand response, and better alignment with renewable energy sources.

Demand for Long-Lasting Batteries

Manufacturers are investing in the development of UPS systems with long-lasting batteries, which are crucial for critical applications like healthcare and manufacturing.

These trends collectively indicate the growing importance of UPS systems in various industries and applications. Manufacturers need to adapt to these trends by embracing innovation, focusing on energy efficiency, and offering sustainable solutions to meet the evolving power protection needs of businesses and organizations worldwide. As technology continues to advance, the UPS market will likely see further developments in line with these trends.

Segmental Insights

Facility Insights

The global Converged Data Centre Infrastructure Market is divided into two facilities: on-premise and colocated data centres. The segment of cocolated data centres is the

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fastest expanding in the converged data centre infrastructure market. This is owing to the advantages of cocolated data centres, which include increased scalability, lower energy consumption, and better performance. Cocolated data centres also assist businesses in lowering their carbon footprint and complying with environmental requirements.

Component Insights

The Converged Data Center Infrastructure Market segmentation, based on Component, includes computational devices, storage devices, networking devices. The converged data centre infrastructure market is dominated by networking devices segment. This is due to the growing demand for high-speed data transport and the requirement for improved network connectivity across a wide range of businesses. Switches, routers, and gateways assist enterprises in managing and optimizing their network infrastructure, resulting in greater performance and less downtime.

Regional Insights

The North American Converged Data Center Infrastructure Market area will dominate this market, Because of the rising deployment of Industry 4.0 in the manufacturing sector in recent years. Furthermore, the presence of a high number of data centres in these locations is contributing to the growth of the Converged Data Centre Infrastructure market by reducing latency.

Europe Converged Data Center Infrastructure Market accounts for the second-largest market share because of increased mobile data usage, expanding BYOD regulations, and other factors. Further, the German Converged Data Center Infrastructure Market held the largest market share, and the UK Converged Data Center Infrastructure Market was the fastest growing market in the European regionThe Asia-Pacific Converged Data Center Infrastructure Market is expected to grow at the fastest CAGR from 2023 to 2032. This is due to increasing government investments and initiatives for smart city development. Moreover, China’s Converged Data Center Infrastructure Market held the largest market share, and the Indian Converged Data Center Infrastructure Market was the fastest growing market in the Asia-Pacific region.

Key Market Players

Emerson Electric Co.

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ABB Ltd

Schneider Electric SE

Riello Elettronica SpA

EATON Corporation PLC

Toshiba Corporation

Xiamen Kehua Hengsheng Co. Ltd.

Report Scope:

In this report, the Global Converged Data Center Infrastructure Market has been segmented into the following categories, in addition to the industry trends which have also been detailed below:

Global Converged Data Center Infrastructure Market, By Deployment:

Reference Architecture

Pre-Racked Configuration

Global Converged Data Center Infrastructure Market, By Component:

Computational Devices

Storage Devices

Networking Devices

Global Converged Data Center Infrastructure Market, By Facility:

On-Premise

Colocated Data Center

Global Converged Data Center Infrastructure Market, By Region:

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North America

United States

Canada

Mexico

Asia-Pacific

China

India

Japan

South Korea

Indonesia

Europe

Germany

United Kingdom

France

Russia

Spain

South America

Brazil

Argentina

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Middle East & Africa

Saudi Arabia

South Africa

Egypt

UAE

Israel

Competitive Landscape

Company Profiles: Detailed analysis of the major companies presents in the Global Converged Data Center Infrastructure Market.

Available Customizations:

Global Converged Data Center Infrastructure Market report with the given market data, Tech Sci Research offers customizations according to a company's specific needs. The following customization options are available for the report:

Company Information

Detailed analysis and profiling of additional market players (up to five).

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