

Mainframe Market Size, Share, and Outlook, 2025 Report- By Type (Z systems, GS series, Others), By Distribution Channel (Direct Sale, Distributors, Specialty Store), By Component (Operating System, Central Processing Unit, Channels, Storage Subsystems, Mass Storage Devices, Communications Controllers), By End-User (Banking, Financial Services, and Insurance, IT & Telecom, Government & Public Sector, Retail, Travel & Transportation, Manufacturing, Others), 2018-2032

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Abstracts

Mainframe Market Outlook

The Mainframe Market size is expected to register a growth rate of 7.6% during the forecast period from \$3.44 Billion in 2025 to \$5.7 Billion in 2032. The Mainframe market is a thriving business that is poised to keep growing and presents potential growth opportunities for companies across the industry value chain.

The comprehensive market research report presents 12-year historic and forecast data on Mainframe segments across 22 countries from 2021 to 2032. Key segments in the report include By Type (Z systems, GS series, Others), By Distribution Channel (Direct Sale, Distributors, Specialty Store), By Component (Operating System, Central Processing Unit, Channels, Storage Subsystems, Mass Storage Devices, Communications Controllers), By End-User (Banking, Financial Services, and Insurance, IT & Telecom, Government & Public Sector, Retail, Travel & Transportation,

Manufacturing, Others). Over 70 tables and charts showcase findings from our latest survey report on Mainframe markets.

Mainframe Market Insights, 2025

The Mainframe market is witnessing a resurgence as businesses continue to rely on these robust, high-performance computing systems for mission-critical applications in sectors such as banking, insurance, government, and large enterprises. Mainframes are known for their reliability, scalability, and ability to process large volumes of data simultaneously, making them indispensable in environments where uptime and data integrity are paramount. Despite the rise of cloud computing and distributed systems, many large organizations continue to use mainframes due to their unmatched ability to handle complex workloads, especially in legacy systems that require high levels of processing power and security. The growing demand for digital transformation and the integration of mainframes with cloud infrastructure are creating new opportunities for these systems, enabling businesses to leverage the power of both mainframes and cloud computing in a hybrid environment. Furthermore, the increasing focus on cybersecurity and regulatory compliance is driving demand for mainframes, which provide built-in security features to protect sensitive data. As organizations continue to generate and process vast amounts of data, the mainframes market is expected to grow, with advancements in processing power, energy efficiency, and virtualization driving their continued relevance in modern IT infrastructures.

Five Trends that will define global Mainframe market in 2025 and Beyond

A closer look at the multi-million market for Mainframe identifies rapidly shifting consumer preferences across categories. By focusing on growth and resilience, leading Mainframe companies are prioritizing their investments across categories, markets, and geographies. The report analyses the most important market trends shaping the new landscape to support better decisions for the long and short-term future. The impact of tariffs by the US administration also significantly impact the profitability of Mainframe vendors.

What are the biggest opportunities for growth in the Mainframe industry?

The Mainframe sector demonstrated remarkable resilience over the past year across developed and developing economies. Further, the market presents significant opportunities to leverage the existing momentum towards actions by 2032. On the other hand, recent macroeconomic developments including rising inflation and supply chain

disruptions are putting pressure on companies. The chapter assists users to identify growth avenues and address business challenges to make informed commercial decisions with unique insights, data forecasts, and in-depth market analyses.

Mainframe Market Segment Insights

The Mainframe industry presents strong offers across categories. The analytical report offers forecasts of Mainframe industry performance across segments and countries. Key segments in the industry include%li%By Type (Z systems, GS series, Others), By Distribution Channel (Direct Sale, Distributors, Specialty Store), By Component (Operating System, Central Processing Unit, Channels, Storage Subsystems, Mass Storage Devices, Communications Controllers), By End-User (Banking, Financial Services, and Insurance, IT & Telecom, Government & Public Sector, Retail, Travel & Transportation, Manufacturing, Others). The largest types, applications, and sales channels, fastest growing segments, and the key factors driving each of the categories are included in the report.

Forecasts of each segment across five regions are provided from 2021 through 2032 for Asia Pacific, North America, Europe, South America, Middle East, and African regions. In addition, Mainframe market size outlook is provided for 22 countries across these regions.

Market Value Chain

The chapter identifies potential companies and their operations across the global Mainframe industry ecosystem. It assists decision-makers in evaluating global Mainframe market fundamentals, market dynamics, and disruptive trends across the value chain segments.

Scenario Analysis and Forecasts

Strategic decision-making in the Mainframe industry is multi-faceted with the increased need for planning across scenarios. The report provides forecasts across three case scenarios%li%low growth, reference case, and high growth cases.

Asia Pacific Mainframe Market Analysis%li%A Promising Growth Arena for Business Expansion

As companies increasingly expand across promising Asia Pacific markets with over 4.5

billion population, the medium-to-long-term future remains robust. The presence of the fastest-growing economies such as China, India, Thailand, Indonesia, and Vietnam coupled with strengthening middle-class populations and rising disposable incomes drive the market. In particular, China and India are witnessing rapid shifts in consumer purchasing behavior. China is recovering steadily with optimistic forecasts for 2025. Further, Japanese and South Korean markets remain stable with most companies focusing on new product launches and diversification of sales channels.

The State of Europe Mainframe Industry 2025%li%Focus on Accelerating Competitiveness

As companies opt for an integrated agenda for competitiveness, the year 2025 presents optimistic scenarios for companies across the ecosystem. With signs of economic recovery across markets, companies are increasing their investments. Europe is one of the largest markets for Mainframe with demand from both Western Europe and Eastern European regions increasing over the medium to long-term future. Increasing omnichannel shopping amidst robust consumer demand for value purchases shapes the market outlook. The report analyses the key Mainframe market drivers and opportunities across Germany, France, the United Kingdom, Spain, Italy, Russia, and other Europe.

The US Mainframe market Insights%li%Vendors are exploring new opportunities within the US Mainframe industry.

Easing inflation coupled with strengthening consumer sentiment is encouraging aggressive actions from the US Mainframe companies. Market players consistently focusing on innovation and pursuing new ways to create value are set to excel in 2025. In addition, the Canadian and Mexican markets offer lucrative growth pockets for manufacturers and vendors. Focus on private-brand offerings and promotions, diversified sales channels, expansion into niche segments, adoption of advanced technologies, and sustainability are widely observed across the North American Mainframe market.

Latin American Mainframe market outlook rebounds in line with economic growth.

Underlying demand remains higher among urban consumers with an optimistic economic outlook across Brazil, Argentina, Chile, and other South and Central American countries. Increased consumer spending has been reported in Q1 -2025 and the prospects remain strong for rest of 2025. Aggressive ecosystem moves to create

new sources of income are widely observed across markets in the region. Marketing activities focused on customer insights, operations, and support functions are quickly gaining business growth in the region.

Middle East and Africa Mainframe Markets%li%New Opportunities for Companies Harnessing Diversity

Rapid growth in burgeoning urban locations coupled with a young and fast-growing population base is attracting new investments in the Middle East and African Mainframe markets. Designing expansion and marketing strategies to cater to the local consumer base supports the market prospects. In addition to Nigeria, Algeria, South Africa, and other markets, steady growth markets in Ethiopia, Rwanda, Ghana, Tanzania, the Democratic Republic of Congo, and others present significant prospects for companies. On the other hand, Middle Eastern Mainframe markets including the UAE, Saudi Arabia, Qatar, and Oman continue to offer lucrative pockets of growth.

Competitive Landscape%li%How Mainframe companies outcompete in 2025?

The ability to respond quickly to evolving consumer preferences and adapt businesses to niche consumer segments remains a key growth factor. The report identifies the leading companies in the industry and provides their revenue for 2024. The market shares of each company are also included in the report. Further, business profiles, SWOT analysis, and financial analysis of each company are provided in detail. Key companies analyzed in the report include BMC Software Inc, CA Technologies, Compuware Corp, Dell EMC, Fujitsu Ltd, HCL Technologies, Hewlett Packard Enterprise, IBM Corp, NEC Corp, Unisys Corp.

Mainframe Market Segmentation

By Type

Z systems

GS series

Others

By Distribution Channel

Direct Sale

Distributors

Specialty Store

By Component

Operating System

Central Processing Unit

Channels

Storage Subsystems

Mass Storage Devices

Communications Controllers

By End-User

Banking, Financial Services, and Insurance

IT & Telecom

Government & Public Sector

Retail

Travel & Transportation

Manufacturing

Others

Leading Companies

BMC Software Inc

CA Technologies

Compuware Corp

Dell EMC

Fujitsu Ltd

HCL Technologies

Hewlett Packard Enterprise

IBM Corp

NEC Corp

Unisys Corp

Reasons to Buy the report

Make informed decisions through long and short-term forecasts across 22 countries and segments.

Evaluate market fundamentals, dynamics, and disrupting trends set to shape 2025 and beyond.

Gain a clear understanding of the competitive landscape, with product portfolio and growth strategies.

Get an integrated understanding of the entire market ecosystem and companies.

Stay ahead of the competition through plans for growth in a changing environment for your geographic expansion.

Assess the impact of advanced technologies and identify growth opportunities based on actionable data and insights.

Get free Excel spreadsheet and PPT versions along with the report PDF.

Contents

1. TABLE OF CONTENTS

List of Figures and Tables

2. EXECUTIVE SUMMARY

2.1 Key Highlights

2.1.1 Mainframe Market Size Outlook, 2018-2024 and 2025-2032

2.1.2 Largest Mainframe Market Types and Applications

2.1.3 Fastest Growing Segments

2.1.4 Potential Markets

2.1.5 Market Concentration

2.2 Market Scope and Segmentation

2.2.1 Market Scope- Segments

2.2.2 Market Scope- Countries

2.2.3 Macroeconomic and Demographic Outlook

2.2.4 Abbreviations

2.2.5 Units and Currency Conversions

3. RESEARCH METHODOLOGY

3.1 Primary Research Surveys

3.2 Secondary Data Sources

3.3 Data Triangulation

3.4 Forecast Methodology

3.5 Assumptions and Limitations

4. INTRODUCTION TO GLOBAL MAINFRAME MARKET IN 2025

4.1 Industry Panorama

4.2 Leading Companies Profiled in the Study

4.3 Asia Pacific Markets offer Robust Market Prospects for New Entrants

4.4 Market Dynamics

4.4.1 Market Dynamics- Trends and Drivers

4.4.2 Market Dynamics- Opportunities and Challenges

4.5 Regional Analysis

4.6 Porter's Five Force Analysis

- 4.6.1 Intensity of Competitive Rivalry
- 4.6.2 Threat of New Entrants
- 4.6.3 Threat of Substitutes
- 4.6.4 Bargaining Power of Buyers
- 4.6.5 Bargaining Power of Suppliers
- 4.7 Mainframe Industry Value Chain Analysis
 - 4.7.1 Stage of Value Chain
 - 4.7.2 Key Activities of Companies
 - 4.7.3 Companies Included in Each Stage
 - 4.7.4 Key Insights

5. MAINFRAME MARKET OUTLOOK TO 2032

- 5.1 Market Size Forecast by Type, 2021-2024 and 2025-2032
- 5.2 Market Size Forecast by Application, 2021-2024 and 2024-2032
- 5.3 Market Size Forecast by Geography, 2021-2024 and 2024-2032

By Type

Z systems

GS series

Others

By Distribution Channel

Direct Sale

Distributors

Specialty Store

By Component

Operating System

Central Processing Unit

Channels

Storage Subsystems

Mass Storage Devices

Communications Controllers

By End-User

Banking, Financial Services, and Insurance

IT & Telecom

Government & Public Sector

Retail

Travel & Transportation

Manufacturing

Others

6. GLOBAL MAINFRAME MARKET OUTLOOK ACROSS GROWTH SCENARIOS

- 6.1 Low Growth Scenario**
- 6.2 Base/Reference Case**
- 6.3 High Growth Scenario**

6. NORTH AMERICA MAINFRAME MARKET SIZE OUTLOOK

- 6.1 Key Market Statistics, 2024**
- 6.2 North America Mainframe Market Trends and Growth Opportunities**
 - 6.2.1 North America Mainframe Market Outlook by Type**
 - 6.2.2 North America Mainframe Market Outlook by Application**
- 6.3 North America Mainframe Market Outlook by Country**
 - 6.3.1 The US Mainframe Market Outlook, 2021- 2032**
 - 6.3.2 Canada Mainframe Market Outlook, 2021- 2032**
 - 6.3.3 Mexico Mainframe Market Outlook, 2021- 2032**

7. EUROPE MAINFRAME MARKET SIZE OUTLOOK

- 7.1 Key Market Statistics, 2024**
- 7.2 Europe Mainframe Market Trends and Growth Opportunities**
 - 7.2.1 Europe Mainframe Market Outlook by Type**
 - 7.2.2 Europe Mainframe Market Outlook by Application**
- 7.3 Europe Mainframe Market Outlook by Country**
 - 7.3.2 Germany Mainframe Market Outlook, 2021- 2032**
 - 7.3.3 France Mainframe Market Outlook, 2021- 2032**
 - 7.3.4 The UK Mainframe Market Outlook, 2021- 2032**
 - 7.3.5 Spain Mainframe Market Outlook, 2021- 2032**
 - 7.3.6 Italy Mainframe Market Outlook, 2021- 2032**
 - 7.3.7 Russia Mainframe Market Outlook, 2021- 2032**
 - 7.3.8 Rest of Europe Mainframe Market Outlook, 2021- 2032**

8. ASIA PACIFIC MAINFRAME MARKET SIZE OUTLOOK

- 8.1 Key Market Statistics, 2024**
- 8.2 Asia Pacific Mainframe Market Trends and Growth Opportunities**
 - 8.2.1 Asia Pacific Mainframe Market Outlook by Type**
 - 8.2.2 Asia Pacific Mainframe Market Outlook by Application**

8.3 Asia Pacific Mainframe Market Outlook by Country

- 8.3.1 China Mainframe Market Outlook, 2021- 2032**
- 8.3.2 India Mainframe Market Outlook, 2021- 2032**
- 8.3.3 Japan Mainframe Market Outlook, 2021- 2032**
- 8.3.4 South Korea Mainframe Market Outlook, 2021- 2032**
- 8.3.5 Australia Mainframe Market Outlook, 2021- 2032**
- 8.3.6 South East Asia Mainframe Market Outlook, 2021- 2032**
- 8.3.7 Rest of Asia Pacific Mainframe Market Outlook, 2021- 2032**

9. SOUTH AMERICA MAINFRAME MARKET SIZE OUTLOOK

9.1 Key Market Statistics, 2024

9.2 South America Mainframe Market Trends and Growth Opportunities

- 9.2.1 South America Mainframe Market Outlook by Type**
- 9.2.2 South America Mainframe Market Outlook by Application**

9.3 South America Mainframe Market Outlook by Country

- 9.3.1 Brazil Mainframe Market Outlook, 2021- 2032**
- 9.3.2 Argentina Mainframe Market Outlook, 2021- 2032**
- 9.3.3 Rest of South and Central America Mainframe Market Outlook, 2021- 2032**

10. MIDDLE EAST AND AFRICA MAINFRAME MARKET SIZE OUTLOOK

10.1 Key Market Statistics, 2024

10.2 Middle East and Africa Mainframe Market Trends and Growth Opportunities

- 10.2.1 Middle East and Africa Mainframe Market Outlook by Type**
- 10.2.2 Middle East and Africa Mainframe Market Outlook by Application**

10.3 Middle East and Africa Mainframe Market Outlook by Country

- 10.3.1 Saudi Arabia Mainframe Market Outlook, 2021- 2032**
- 10.3.2 The UAE Mainframe Market Outlook, 2021- 2032**
- 10.3.3 Rest of Middle East Mainframe Market Outlook, 2021- 2032**
- 10.3.4 South Africa Mainframe Market Outlook, 2021- 2032**
- 10.3.5 Egypt Mainframe Market Outlook, 2021- 2032**
- 10.3.6 Rest of Africa Mainframe Market Outlook, 2021- 2032**

11. COMPANY PROFILES

11.1 Leading 10 Companies

BMC Software Inc

CA Technologies

Compuware Corp
Dell EMC
Fujitsu Ltd
HCL Technologies
Hewlett Packard Enterprise
IBM Corp
NEC Corp
Unisys Corp
11.2 Overview
11.3 Products and Services
11.4 SWOT Profile

12. APPENDIX

12.1 Subscription Options
12.2 Customization Options
12.3 Publisher Details

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