

Mainframe Software Market Size, Share, and Outlook, 2025 Report- By Application (ENIAC, UNIVAC, ASCC), By Organization Size (Small and Medium Enterprise, Large Enterprise), By Operating System (Z System, GS Series, Others), By End-User (BFSI, IT and Telecom, Retail, Government, Logistics & Transportation, Others), 2018-2032

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Abstracts

Mainframe Software Market Outlook

The Mainframe Software Market size is expected to register a growth rate of 6.6% during the forecast period from \$2.32 Billion in 2025 to \$3.6 Billion in 2032. The Mainframe Software 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 Software segments across 22 countries from 2021 to 2032. Key segments in the report include By Application (ENIAC, UNIVAC, ASCC), By Organization Size (Small and Medium Enterprise, Large Enterprise), By Operating System (Z System, GS Series, Others), By End-User (BFSI, IT and Telecom, Retail, Government, Logistics & Transportation, Others). Over 70 tables and charts showcase findings from our latest survey report on Mainframe Software markets.

Mainframe Software Market Insights, 2025

The Mainframe Software market is witnessing a resurgence as enterprises continue to rely on mainframe systems for handling critical applications, such as transaction

processing, database management, and complex data analysis. Despite the rise of cloud computing and other modern technologies, mainframes remain integral to the operations of many large organizations, particularly in sectors such as banking, insurance, and government, where processing large volumes of data in real-time is essential. Mainframe software provides a broad array of services, from operating systems and middleware to specialized applications for security, data management, and optimization. The market is driven by the continued need for high-performance computing, reliable systems, and secure processing environments. Additionally, many businesses are modernizing their legacy mainframe systems, seeking to integrate them with newer technologies, such as cloud computing and hybrid infrastructures. As organizations embark on digital transformation initiatives, they are increasingly looking to mainframe software solutions that can enhance scalability, performance, and efficiency. Despite the growing adoption of cloud-based solutions, the need for secure, reliable, and efficient computing environments ensures the continued relevance of the mainframe software market, particularly in industries that require the processing of large-scale transactional data.

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

A closer look at the multi-million market for Mainframe Software identifies rapidly shifting consumer preferences across categories. By focusing on growth and resilience, leading Mainframe Software 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 Software vendors.

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

The Mainframe Software 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 Software Market Segment Insights

The Mainframe Software industry presents strong offers across categories. The analytical report offers forecasts of Mainframe Software industry performance across segments and countries. Key segments in the industry include%li%By Application (ENIAC, UNIVAC, ASCC), By Organization Size (Small and Medium Enterprise, Large Enterprise), By Operating System (Z System, GS Series, Others), By End-User (BFSI, IT and Telecom, Retail, Government, Logistics & Transportation, 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 Software 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 Software industry ecosystem. It assists decision-makers in evaluating global Mainframe Software market fundamentals, market dynamics, and disruptive trends across the value chain segments.

Scenario Analysis and Forecasts

Strategic decision-making in the Mainframe Software 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 Software 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 Software 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 Software 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 Software market drivers and opportunities across Germany, France, the United Kingdom, Spain, Italy, Russia, and other Europe.

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

Easing inflation coupled with strengthening consumer sentiment is encouraging aggressive actions from the US Mainframe Software 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 Software market.

Latin American Mainframe Software 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 Software 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 Software 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 Software markets including the UAE, Saudi Arabia, Qatar, and Oman continue to offer lucrative pockets of growth.

Competitive Landscape%li%How Mainframe Software 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 ASG Technologies Group Inc, Beta Systems Group, BMC Software Inc, Broadcom, CSI International, GSF Software, IBM, Levi, Ray & Shoup, Lookup Mainframe Software, MacKinney Systems, Precisely, Rocket Software, SDS, Software AG, UNICOM Systems.

Mainframe Software Market Segmentation

By Application

ENIAC

UNIVAC

ASCC

By Organization Size

Small and Medium Enterprise

Large Enterprise

By Operating System

Z System

GS Series

Others

By End-User

BFSI

IT and Telecom

Retail

Government

Logistics & Transportation

Others

Leading Companies

ASG Technologies Group Inc

Beta Systems Group

BMC Software Inc

Broadcom

CSI International

GSF Software

IBM

Levi, Ray & Shoup

Lookup Mainframe Software

MacKinney Systems

Precisely

Rocket Software

SDS

Software AG

UNICOM Systems

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.

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By Application

ENIAC

UNIVAC

ASCC

By Organization Size

Small and Medium Enterprise

Large Enterprise

By Operating System

Z System

GS Series

Others

By End-User

BFSI

IT and Telecom

Retail

Government

Logistics & Transportation

Others

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 - Beta Systems Group**
 - BMC Software Inc**

Broadcom
CSI International
GSF Software
IBM
Levi, Ray & Shoup
Lookup Mainframe Software
MacKinney Systems
Precisely
Rocket Software
SDS
Software AG
UNICOM Systems
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