SCOTTS INTERNATIONAL

Modular Data Center Market by Component (Solutions (All-in-One Modules and Individual Modules) and Services), Organization Size, Vertical (BFSI, IT & Telecom, Media & Entertainment, Healthcare) and Region - Global Forecast to 2030

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Report description:

The modular data center market size is expected to grow from USD 23.0 billion in 2022 to USD 88.5 billion by 2030 at a Compound Annual Growth Rate (CAGR) of 18.4% during the forecast period. Modular data centers basically are standardized, pre-configured, and integrated data center units. These are designed with a focus on lower-cost pre-existing warehouses or outdoor locations (colocation facilities). Prefabricated modular data centers are quick to set up, more predictable in operation, replacement, carrying out upgrades, maintenance, often at a lower cost than traditional stick-built data centers. When we consider building data infrastructure, modular data centers can be a cost-effective option. Modular data centers are recommended for scalability since they can be used to provide data infrastructure as needed rather than requiring large-scale investment.
Individual module segment to have significant growth during the forecast period
This module comprises of separate modules built for specific purposes and deployed in a new or pre-existing modular data center. Individual modules are adopted and used by enterprises in order to expand and enhance their data center functionalities. Inclusion of this module allows separation of maintenance personnel which in turn makes redundant human error negligible. Using multiple individual modules, complex and larger installations can be achieved quickly and easily. Individual modules that have been predefined allow for the plug-and-play installation of entire data center infrastructures. Network and server enclosures, cooling, power distribution, and backup, as well as monitoring and Data Center Infrastructure Management (DCIM) software, are all included in the modules. These utilities and advantages of individual modules boost this segment's growth.
IT and Telecom vertical to hold the second largest market size during the forecast period
The IT & telecom industry requires high data security, integrated physical security, and productivity. The sector is booming due to the large-scale growth in mobile subscribers and data penetration. Telecom service providers are investing largely in modular data center construction and colocations, as modular data centers are portable, flexible, reliable, and store huge amounts of data.

Modular data centers provide comprehensive solutions for managing all the data needs of the IT & telecom sector by providing secure and high-speed deployment. The high rise in online web pages and video content delivered through high-speed data by telecom service providers to internet-enabled devices has increased data traffic.

Modular data center market in Asia Pacific to grow at the highest CAGR during the forecast period

Asia Pacific is expected to be the world's fastest modular data center market and is projected to grow at the highest CAGR during the forecast period. The region is witnessing heavy demand for modular data center solutions. The potential benefits of modular data centers are the key growth drivers of the increasing adoption in the region. The growing number of cloud service providers is also expected to contribute to the growth of the Asia Pacific modular data center market. Moreover, other Asia Pacific countries, including India, China, Japan, Australia, and New Zealand, are also expected to contribute significantly to the growth in the number of modular data center market in the region over the coming years. The growing economy and rising adoption of various technologies, such as edge computing, IoT, and Industry 4.0, are expected to drive the need for storing and computing real-time data locally, eventually increasing the demand for reliable and efficient modular data center solutions. The rapid growth of social media and the gaming sector in the Asia Pacific region has further increased the demand for explicitly scalable and flexible architecture capable of handling complex operations. This demand can be met by the effective deployment of modular data center solutions, hence contributing to the growth of the Asia Pacific market.

Further, in-depth interviews were conducted with the Chief Executive Officers (CEOs), Chief Marketing Officers (CMO), Chief Technology Officers (CTOs), Chief Operating Officers (COOs), Vice Presidents (VPs), Managing Directors (MDs), technology and innovation directors, and related key executives from various key companies and organizations operating in the modular data center market.

- By Company - Tier 1-33%, Tier 2-41%, and Tier 3-26%
- By Designation - C-Level-47%, Director Level-35%, and Others-18%
- By Region - North America-49%, Europe-29%, Asia Pacific-17%, RoW - 5%

The modular data center market comprises major solution providers, such as DELL Technologies (US), Vertiv Co. (US), Hewlett Packard Enterprises (US), Huawei Technologies Co. Ltd. (China), International Business Machines Corporation (US), BaseLayer Technology, LLC. (US), Eltek AS (Norway), Cannon Technologies Ltd. (UK), Oracle (US), Microsoft (US), AWS (US), Meta (US), Apple (US), Rittal GmbH & Co. KG (Germany), BladeRoom Group Ltd (UK), Edge Mission Critical Systems LLC (US), Eaton Corporate PLC (Ireland), Rahi Systems Pvt Ltd. (US), STULZ GmbH (Germany), Fiberhome Networks (China), ScaleMatrix Holdings Inc. (US), Schneider Electric SE (France), Cupertino Electric Inc. (US), Shenzhen KSTAR Science and Technology Co. Ltd. (China), Asperitas (Netherlands), Shenzhen CONSONANT Technology Co. Ltd. (China), Retex (Spain), ICTroom Company BV (Netherlands), Box Modul AB (Sweden), and PCX Corporation LLC (US).

The study includes an in-depth competitive analysis of these key players in the modular data center market with their company profiles, recent developments, and key market strategies.

Research Coverage

The research study covered inputs, insights, trends, happenings, from secondary sources, primary sources, stakeholders' interviews and surveys. Secondary sources include information from databases and repositories such as D&B Hoovers, Bloomberg, Factiva, CoinDesk, among others. Primary data was fetched from supply side industry experts who hold the chair of Chief Executive Officer (CEO), Chief Technological Officer (CTO), Chief Operating Officer (COO), Vice-President (VP) of IT, Managing Director (MD), among others. Few of our key primary respondents are HPE, Eaton, Nutanix, Oracle, DELL, among others. Few startups are also included during our primary interviews. Additionally, we have taken information and statistical and historical data from few government associations, public sources, webinar and seminar transcripts, journals, conferences and events .

Key benefits of the report

The report would help the market leaders/new entrants in this market with information on the nearest and best possible accurate approximations of the revenue numbers for the overall modular data center market and the subsegments therein. This report would help stakeholders understand the competitive landscape wherein we have a section that provides competitive benchmarking, and gain insights to better position their businesses and plan suitable go-to-market strategies. Industry experts who have long served this market including both large-sized and SMEs have provided both qualitative and quantitative insights, critical and crucial data, which would also assist businesses in qualifying the suspects and prospects. The report also helps stakeholders understand the pulse of the market and provides them with information on the key market drivers, restraints, challenges, and opportunities, thereby portraying a clear and vivid image of methods and measures to excel in this market and position self at the zenith along with top players in the segment, sub-segment and the market as a whole.

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