

Cloud Monitoring - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts 2019 - 2029

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Report description:

The Cloud Monitoring Market size is estimated at USD 3.13 billion in 2024, and is expected to reach USD 7.76 billion by 2029, growing at a CAGR of 19.91% during the forecast period (2024-2029).

Key Highlights

- The cloud monitoring market refers to the industry that provides tools, solutions, and services for monitoring and managing cloud-based infrastructure, applications, and services. Cloud monitoring involves collecting, analyzing, and visualizing data related to the performance, availability, and security of cloud resources.
- Cloud monitoring solutions help organizations ensure the smooth functioning of their cloud environments, detect and address performance issues, optimize resource utilization, and ensure compliance with service-level agreements. These solutions typically offer features such as real-time monitoring, performance analytics, alerting, log analysis, security monitoring, and capacity planning.
- End-user industries are incorporating the cloud for scale and agility. However, gaining a clear view of performance in cloud environments can be challenging. To intelligently manage complex, ever-changing applications and infrastructure, a monitoring solution is needed that's as dynamic as the cloud.
- Moreover, the growing adoption of cloud technology across industries such as banking, financial services, and insurance (BFSI), information technology (IT), retail, and other industries is driving the growth of the cloud monitoring market. Cloud monitoring is a crucial component of an overall cloud management strategy, enabling IT administrators to review the operational status of cloud-based resources.
- The growing deployment of software-as-a-service (SaaS) offerings such as customer relationship management, human capital management, enterprise resource management, and other financial applications form a favorable environment for adopting cloud monitoring, especially in large organizations.

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-Cloud environments, especially those with complex architectures, distributed systems, and multi-cloud or hybrid cloud setups, can pose difficulties in achieving comprehensive visibility. Organizations may struggle to monitor and manage their cloud resources effectively, resulting in reduced operational efficiency, increased risk of performance issues, and potential downtime. Limited visibility can arise from factors such as the lack of standardized monitoring interfaces across different cloud platforms, inadequate monitoring tools, and difficulties correlating data from disparate sources.

-The COVID-19 pandemic accelerated the adoption of cloud technologies as organizations rapidly transitioned to remote work setups. Cloud platforms became essential for ensuring business continuity and enabling remote collaboration. This increased reliance on the cloud created a greater need for cloud monitoring solutions to ensure cloud environments' performance, availability, and security. Post-pandemic also, the market is growing rapidly with the growth in cloud adoption across various end users.

Cloud Monitoring Market Trends

Growth in Cloud Adoption Across End Users is Expected to Drive the Market Growth

- The growth in cloud adoption across end users has been a significant driver for the cloud monitoring market. Effective monitoring and managing cloud environments become crucial as more organizations migrate their infrastructure, applications, and data to the cloud.

- Cloud monitoring involves collecting, analyzing, and visualizing data regarding the performance, availability, and security of cloud resources and services. It helps organizations ensure the optimal functioning of their cloud infrastructure, identify and address performance issues, and ensure compliance with service-level agreements.

- Cloud environments offer the ability to scale resources up or down based on demand. However, this dynamic nature makes monitoring and managing resources challenging. Cloud monitoring tools provide real-time visibility into resource utilization, ensuring optimal scalability and cost efficiency.

- Organizations are increasingly moving their IT infrastructure from on-premises to cloud environments such as Amazon Web Services (AWS), Microsoft Azure, Oracle, Alibaba, IBM Cloud, Google Cloud Platform, and others. During this migration, monitoring solutions are essential for tracking the performance of applications and infrastructure components in the cloud. According to Flexera Software, in 2023, 47 percent of respondents are already running significant workloads on Amazon Web Services (AWS).

- Cloud-based applications often have complex architectures with various components, microservices, and dependencies. Monitoring these distributed environments requires specialized tools to track performance across different services and provide insights into system interactions and dependencies.

Asia-Pacific Expected to be the Fastest Growing Region

- The Asia-Pacific (APAC) region has been witnessing significant growth in the cloud monitoring market. The increasing adoption of cloud technologies, digital transformation initiatives, and the proliferation of data centers in the region have contributed to the expansion of the cloud monitoring market in APAC.

- APAC countries such as China, Japan, Singapore, and Australia have experienced a surge in cloud adoption. Organizations in various sectors, including banking, healthcare, manufacturing, and retail, are migrating their infrastructure and applications to the cloud. This widespread adoption has increased the demand for cloud monitoring solutions to ensure cloud environments' performance, availability, and security.

- APAC countries actively pursue digital transformation initiatives to enhance business operations, improve customer experiences, and drive innovation. Cloud technologies play a vital role in enabling digital transformation, and monitoring these cloud

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environments is crucial to ensure seamless operations and optimal utilization of resources.

- According to the China Academy of Information and Communications Technology (CAICT), China's cloud computing business increased by 56.6% in 2022 to CNY 209.1 billion (USD 32.9 billion). The market is expected to expand quickly in the next three years, surpassing CNY 400 billion by 2023.

- APAC has seen significant investments in data centers driven by the growing demand for cloud services and the increasing volume of data generated by businesses. Cloud monitoring solutions are essential for managing and monitoring the performance of these data centers, ensuring efficient operations and high availability of services.

Cloud Monitoring Industry Overview

The cloud monitoring market is moderately fragmented, with the presence of major players like AWS, Broadcom Inc. (CA Technologies), IDERA Inc., LogicMonitor Inc., and Oracle Corporation. Players in the market are adopting strategies such as partnerships, innovations, and acquisitions to enhance their product offerings and gain sustainable competitive advantage.

In April 2023, Amazon Web Services (AWS) launched the AWS Cloud Operations Competency. AWS Cloud Operations covers five fundamental solution areas: cloud financial management, cloud governance, cloud monitoring and observability, cloud compliance and auditing, and cloud operations management. Due to the new competence, customers can select verified AWS partners that provide comprehensive solutions with an integrated approach across several domains.

In June 2022, Cisco released AppDynamics Cloud, a cloud-native observability platform for modern applications built on increasingly complex, distributed architectures and services. It is designed for simplicity, usefulness, and intuitiveness, and it enables IT teams to create the excellent digital experiences that organizations, customers, and end users currently demand. Current AppDynamics customers may upgrade to AppDynamics Cloud and continue to use their existing application performance monitoring (APM) agents or feed both platforms concurrently. AppDynamics Cloud supports AWS cloud-native, managed Kubernetes deployments, with a planned extension to Microsoft Azure, Google Cloud Platform, and other cloud providers.

Additional Benefits:

- The market estimate (ME) sheet in Excel format
- 3 months of analyst support

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