

## **Data Center Infrastructure Management (DCIM) - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts 2019 - 2029**

Market Report | 2024-02-17 | 120 pages | Mordor Intelligence

### **AVAILABLE LICENSES:**

- Single User License \$4750.00
- Team License (1-7 Users) \$5250.00
- Site License \$6500.00
- Corporate License \$8750.00

### **Report description:**

The Data Center Infrastructure Management Market size is estimated at USD 213.24 billion in 2024, and is expected to reach USD 287.67 billion by 2029, growing at a CAGR of 6.17% during the forecast period (2024-2029).

Due to the Covid-19 pandemic, challenges concerning the construction of new data center capacity have risen. Most vendors are postponing or canceling projects or activities, which could increase the risk of infection. As per Vantage, construction being stalled is inevitable as multiple workers move around building sites, making the social-distancing rules hard to implement instead of ensuring staff safety.

#### Key Highlights

- The need to manage limited space and high rack densities to reduce IT system downtime has driven the data center infrastructure management (DCIM) market's growth for the past few years.
- According to AFCOM estimates, the current rack density is valued at 16.9 kW in data centers. According to a data Centers Association (AFCOM) study, close to 67% reported increased rack density in the past three years. Moreover, the study highlights that with an average power density of about 7 kilowatts per rack, most data centers face challenges in managing their IT workloads with traditional air-cooling methods.
- 5G is expected to play a crucial role in supporting governments and policymakers to transform their cities into smart cities, allowing citizens to realize and partake in the socio-economic benefits of an advanced, data-intensive digital economy. Therefore, policymakers must construct and upgrade passive assets like fiber networks and data centers.
- Factors driving the rack density include the growth of cloud computing, Big Data, and AI. It is essential to manage IT since more equipment fits into the data center space. Such facts indicate the need for solutions such as DCIM.
- The increasing demand for cloud and data traffic moving from and within the data centers is expected to bolster the market's

**Scotts International. EU Vat number: PL 6772247784**

tel. 0048 603 394 346 e-mail: [support@scott-international.com](mailto:support@scott-international.com)

[www.scott-international.com](http://www.scott-international.com)

growth over the forecast period. According to Cisco Systems, the cloud data center IP traffic is expected to reach 19,509 exabytes per year by 2021, compared to 1,046 exabytes per year of traditional data center traffic.

-Vendors in the market are allowing API integration into DCIM solutions. Overall, the increasing data volumes in the cloud, edge data centers, data center consolidation, etc., are likely to shape data center infrastructure management.

-In April 2022, Compass Datacenters, an American colocation behemoth, formed a business segment named Compass Quantum to sell modular data centers as a service. Each module has enough room, power, and cooling to support 100kW of IT equipment in a two-node redundant arrangement. Quantum can handle site selection, permitting, building, and even facility upkeep as part of the service. If the data center is no longer needed, it will be packed up, refurbished, and sent to another location. Most importantly, rather than making an upfront capital investment, consumers can pay for their white space over the course of 7-10 years through operational expenses. When the initial contract expires, they will have the option to purchase the data center.

-The data center sector has been changing for a long time, but the last several years have been particularly challenging, mainly owing to the COVID-19 pandemic. At first, it may have appeared that all these changes were being made to accommodate stay-at-home orders on temporarily, but that is no longer the case. The surge in remote school and work, making business calls on Zoom instead of the phone, and utilizing an app for everything seems to be a permanent trend.

## Data Center Infrastructure Management Market Trends

### Small and Medium Sized Data Centers is Expected to hold Significant Growth rate

- The word small data center does not always mean implementing a data center in a small business. Depending on business needs and operational feasibility, a large enterprise can also create and deploy multiple small data centers within its footprint. These data centers are demarcation points between various teams or business functions.

- Although the traditional data center network operations center will remain crucial, owing to the rise in cloud adoption, the overall management structure is expected to change, primarily to provide an end-to-end view of the data center operations and the cloud-based services in both public and private clouds. With the advent of the software-defined data center (SDDC), it is expected to become a standard model for data center operations in both legacy and new deployments, irrespective of the data center's size. This is because the ability of these data centers to add services on demand will be a top priority for most companies today.

- Furthermore, with the rise of edge computing, the market is expected to witness a rapidly growing array of smaller data centers built closer to the population centers. For instance, Telecom operators and enterprises in the US and Europe are expected to spend about USD 272 billion on edge computing capabilities between now and 2026. This would fuel the need for smaller data centers over the forecast period.

- Edge technologies, such as wireless medical devices and sensors, lack the necessary computing capacity to process large streams of complex data directly. As a result, smaller data centers are expected to be deployed in the future to offer hyper-local storage and processing capacity at the edge.

- Small data centers are flexible and do not need much space. A small or medium-sized data center can be built in an old property utilizing the existing facilities. The data center developers are witnessing an increasing need to deploy small data centers, mainly between the capacity of 750 kilowatts to 1 megawatt, around highly populated areas.

### North America to Dominate the Market

- The expansion of mobile broadband, growth in cloud computing, and big data analytics are driving the demand for new data center infrastructures in the region. Moreover, the declining prices of servers have increased the adoption of cloud computing businesses across North America, which is expected to fuel the demand for DCIM during the forecast period.

**Scotts International. EU Vat number: PL 6772247784**

tel. 0048 603 394 346 e-mail: [support@scotts-international.com](mailto:support@scotts-international.com)

[www.scotts-international.com](http://www.scotts-international.com)

- In the United States, the Western area has a mature and developed data center market. Data center operators will benefit from the region's high connectivity and closeness to IT hubs, making it a good investment. Digital companies, such as cloud providers and other IT and technology enterprises, accounted for about 90 percent of the industry in California.
- Primary markets in the United States witnessed record absorption in 2021, up 50% from 2020. As a result, total inventory in these markets increased by 17% to 3,358 MW, with another 728 MW under development. In the United States, primary markets saw record absorption in 2021, up 50% from 2020. According to North America Data Center Trends H2, 2021 by CBRE, overall inventory in these markets climbed by 17% to 3,358 MW, with another 728 MW under construction.
- Moreover, In August 2021, Blackstone Infrastructure Partners, Blackstone Real Estate Income Trust, Inc., and Blackstone Property Partners announced that their acquisition of QTS Realty Trust for approximately USD 10 billion, including debt, had been completed. The common stock, Series A preferred stock, and Series B preferred stock of QTS will no longer be traded publicly.
- Almost two-thirds of data centers in the United States experience higher peak demands, with a power density of around 15 or 16 kW per rack, according to Datacenter.com, a data center marketplace. Some data centers are reportedly hitting 20 or more kW per rack. This has made it imperative for users and manufacturers to deploy DCIM, enabling them to manage and run their data centers effectively.
- The key players in this region are focusing on strategic partnerships to provide improved solutions to the clients. For instance, In August 2022, VMware Inc. and IBM announced an expanded relationship at VMware Explore 2022 to help global clients and partners modernize mission-critical workloads and accelerate time to value in hybrid cloud settings. IBM and VMware intend to work together to assist clients in regulated areas such as financial services, healthcare, and government with the cost, complexity, and risk of transferring and upgrading mission-critical workloads in the cloud.
- Moreover, In April 2021, IBM announced significant storage portfolio advancements to improve data access and management in increasingly complex hybrid cloud environments for increased data availability and resilience.

## Data Center Infrastructure Management Industry Overview

The competitive rivalry in the data center infrastructure management market is high, owing to some major players, such as IBM, Siemens, and Schneider Electric. Their continually innovating offerings have given them a competitive advantage over other players. Through strategic partnerships, R&D, and mergers and acquisitions, they have obtained a stronger foothold in the market.

- August 2022 - Schneider Electric, the significant provider of digital transformation of energy management and automation, announced that Leading Edge Data Centres (LEDC), a company that provides Regional Australian businesses and communities with greater access to the distributed cloud through reliable, cost-effective connectivity, will use Schneider Electric's prefabricated, certified edge data center technology to drive faster and more reliable connectivity for regional Australians.
- March 2022 - Vertiv has partnered with Elea Digital, a data center infrastructure platform. Elea would supply edge data center services across Brazil due to this collaboration. Vertiv would also provide maintenance and operation services for Elea Digital data centers in key cities such as Curitiba, Brasilia, and Porto Alegre.

### Additional Benefits:

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

### Table of Contents:

#### 1 INTRODUCTION

**Scotts International. EU Vat number: PL 6772247784**

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

1.1 Study Assumptions and Market Definition

1.2 Scope of the Study

2 RESEARCH METHODOLOGY

3 EXECUTIVE SUMMARY

4 MARKET INSIGHT

4.1 Market Overview

4.2 Industry Attractiveness - Porter's Five Forces Analysis

4.2.1 Bargaining Power of Suppliers

4.2.2 Bargaining Power of Consumers

4.2.3 Threat of New Entrants

4.2.4 Threat of Substitute Products

4.2.5 Intensity of Competitive Rivalry

4.3 Assessment of the Impact of COVID-19 Pandemic on the Industry

5 MARKET DYNAMICS

5.1 Market Drivers

5.1.1 Rising Need to Manage Energy Consumption Across Data Centers

5.1.2 Increase in the Number of Data Centers

5.2 Market Challenges

5.2.1 Need for Heightened Security for Physical and Network Infrastructures

6 MARKET SEGMENTATION

6.1 By Data Center Type

6.1.1 Small- and Medium-sized Data Centers

6.1.2 Large Data Centers

6.1.3 Enterprise Data Centers

6.2 By Deployment Type

6.2.1 On-premise

6.2.2 Colocation

6.3 By Geography

6.3.1 North America

6.3.2 Europe

6.3.3 Asia Pacific

6.3.4 Rest of the World

7 COMPETITIVE LANDSCAPE

7.1 Company Profiles

7.1.1 Vertiv Group Corp.

7.1.2 Schneider Electric SE

7.1.3 Johnson Controls International PLC

7.1.4 Eaton Corporation PLC

7.1.5 IBM Corporation

7.1.6 Siemens AG

7.1.7 ABB Ltd

**Scotts International. EU Vat number: PL 6772247784**

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

7.1.8 FNT GmbH

7.1.9 Nlyte Software Inc.

7.1.10 Itracs Corporation Inc. (CommScope Inc)

8 VENDOR RANKING ANALYSIS

9 INVESTMENT ANALYSIS

10 FUTURE OF THE MARKET

**Scotts International. EU Vat number: PL 6772247784**

tel. 0048 603 394 346 e-mail: [support@scotts-international.com](mailto:support@scotts-international.com)

[www.scotts-international.com](http://www.scotts-international.com)

**Data Center Infrastructure Management (DCIM) - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts 2019 - 2029**

Market Report | 2024-02-17 | 120 pages | Mordor Intelligence

To place an Order with Scotts International:

- Print this form
- Complete the relevant blank fields and sign
- Send as a scanned email to support@scotts-international.com

**ORDER FORM:**

Select license	License	Price
	Single User License	\$4750.00
	Team License (1-7 Users)	\$5250.00
	Site License	\$6500.00
	Corporate License	\$8750.00
		VAT
		Total

\*Please circle the relevant license option. For any questions please contact support@scotts-international.com or 0048 603 394 346.

\*\* VAT will be added at 23% for Polish based companies, individuals and EU based companies who are unable to provide a valid EU Vat Numbers.

Email*	<input type="text"/>	Phone*	<input type="text"/>
First Name*	<input type="text"/>	Last Name*	<input type="text"/>
Job title*	<input type="text"/>		
Company Name*	<input type="text"/>	EU Vat / Tax ID / NIP number*	<input type="text"/>
Address*	<input type="text"/>	City*	<input type="text"/>
Zip Code*	<input type="text"/>	Country*	<input type="text"/>
		Date	<input type="text" value="2026-03-04"/>
		Signature	

**Scotts International. EU Vat number: PL 6772247784**

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

