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Software Defined Data Center - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts (2025 - 2030)

Market Report | 2025-04-28 | 120 pages | Mordor Intelligence

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Report description:

The Software Defined Data Center Market is expected to register a CAGR of 26.6% during the forecast period.

Key Highlights
- With a few significant exceptions, SDDCs differ from traditional data centers in several ways, notably through virtualization, abstraction, resource pooling, and automation. A software-defined data center is an IT-as-a-Service (ITaaS) platform that meets a business's platform, infrastructure, and software requirements. An SDDC may be on-site, at an MSP, or in hosted, private, or public clouds. SDDCs house servers, storage devices, networking hardware, and security devices like conventional data centers. The operations of a traditional data center are delivered programmatically by an SDDC using a virtualized environment.
- With the introduction of hyper-converged infrastructure-where all IT infrastructure pieces are software-defined and deployed-network, technology can now support cloud SDDC and ITaaS ambitions.
- For IoT in the medium to long term, the Covid-19 impact is expected to be highly positive. Enterprises are expected to speed up their digitization process to overcome problems such as downtime, productivity loss, and supply chain issues, among others.
- Ever-growing security threats that steal critical information can hamper the market's growth. SDDCs must have identity and access management to control users, OS security to safeguard the virtual server, and data security to protect information at rest and in motion. Two-factor authentication must be put in wherever possible to make the SDDC secure.

Software Defined Data Center Market Trends

Software-Defined Storage to Dominate the Market

- Software-Defined storage has become mandatory as enterprise resources are decentralized and increasing in volume. It is also called Storage Virtualization or virtual SAN. Storage virtualization allows many storage units to be combined into one and remove any physical storage in sight. It is helpful for organizations that spend excess on hardware or need more storage facilities to meet SLA.
- Increased data traffic has been the main underlying factor responsible for the demand for data storage. With an increase in IoT adoption worldwide, device connectivity is also growing. Hence, there is an accumulation of vast piles of data.
- As per estimates by Cisco, there are over 50 billion smart connected devices in the world. The data collected from such devices can be analyzed to generate customer transaction patterns and help companies understand the proclivity of their consumers. Also, IBM reported that approximately 90% of the data was generated in the last two years.
- The "internet of things" (IoT) represents the internet's present and future states. It requires a lot of effort and processing procedures to convert the enormous volume of data produced by a big number of linked devices (objects) to the internet into usable information. A comprehensive software-defined framework streamlines the IoT management process by combining the software-defined network, software-defined storage, and security into one software-defined-based control model. It offers a critical solution for the difficulties in the traditional IoT architecture to forward, store, and secure the produced data from the IoT objects. As indicated in the graph, the growing IoT devices are analyzed to contribute to the market growth rate during the forecast period.

The Asia-Pacific to Witness the Highest Growth

- The Asia-Pacific is the fastest growing region for this market due to more startups mushrooming due to steady economic growth, the rapid spread of the internet and smartphones, and increased related business demand.
- This trend is attracting venture capitalists in this region, leading to growth in many companies. Thus, the amount of data generated is also increasing. There has been a strong trend of Asia-Pacific financial centers improving over several years. The top eight centers in the region are now in the top fifteen centers in the whole index. This indicates that with an increase in innovation, the countries would also have to take care of data-storing capabilities.
- A well-maintained SDDC architecture sets up an organization for its transition to a hybrid cloud. As a pool of resources that have been virtualized, SDDC is the optimal foundation for hybrid cloud systems. By automating resource allocations and tasks, streamlining and accelerating application deployment, and serving as the foundation of a high-availability infrastructure, it offers a common platform for both private and public clouds.
- The hybrid cloud in the Asia-Pacific is expected to witness growth in the coming years with a significant growth rate due to cost efficiency, scalability, agility, and security. The hybrid cloud bridges the gap between Information Technology (IT) and businesses by improving agility and efficiency and rapidly delivering IT resources at a low cost. COVID-19 has significantly accelerated the adoption of digital technologies and led to a substantial shift toward the hybrid cloud.
- The development of China's cloud industry is a major strategic objective for the central government, and it was highlighted prominently in the country's 12th and 13th Five-Year Plans. Cloud computing technology has been selected as one of the 11 key technology sectors backed by the government. The National Development and Reform Commission (NDRC) and the Ministry of Industry and Information Technology (MIIT) have built pilot cloud schemes in five cities: Beijing, Hangzhou, Shanghai, Shenzhen, and Wuxi.
- More and more Chinese firms are adopting a hybrid cloud approach to speed up their digital transformation. Alibaba Cloud VMware Service enables clients to modernize apps, infrastructure, and operations more quickly and affordably. The connectors provide enterprise-class computing, storage, and networking capabilities, as well as unified infrastructure and management for increased visibility and automation. These factors are significantly boosting the market growth rate during the forecast period.

Software Defined Data Center Industry Overview

The market for SDDC is highly dominated by players like Oracle, VMware, and Microsoft, which provide virtualization software used by all big and small enterprises. The new entrants are generally acquired by big companies, which increases the latter's product portfolio.

February 2022 - Nutanix, a leading provider of hybrid multi-cloud computing, announced the global availability of a simplified product range to meet fast-changing client needs. This consists of Nutanix Unified Storage (NUS) which provides distributed and software-defined storage for several protocols (volumes, files, and objects) to serve a range of applications deployed everywhere.

May 2022-Broadcom Inc., a global technological leader in the design, development, and supply of semiconductor and infrastructure software solutions, and VMware, Inc., a leading creator in enterprise software, announced an agreement under which Broadcom acquired all of VMware's outstanding shares in a cash-and-stock transaction valued at approximately USD 61 billion. The Broadcom Software Group will join VMware after the acquisition closes, adopting Broadcom's current infrastructure and security software solutions as a part of an expanded VMware offering.

Additional Benefits:

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

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