

Cloud Managed Services - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts (2025 - 2030)

Market Report | 2025-06-01 | 124 pages | Mordor Intelligence

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Report description:

Cloud Managed Services Market Analysis

The cloud managed services market size reaches USD 140.96 billion in 2025 and is set to grow to USD 222.81 billion by 2030, reflecting a 9.59% CAGR. Enterprises continue moving from asset-heavy infrastructure ownership to pay-as-you-go operating models that improve agility, free cash and shorten innovation cycles. Demand rises sharply as multi-cloud sprawl and cybersecurity threats strain in-house IT teams. Financial-services digital mandates, AI-driven workloads and sustainability targets intensify the need for expert external management. North America holds the lion's share of spending, yet Asia Pacific's large untapped base and pro-cloud policy environment make it the fastest-expanding region. Competition increasingly revolves around automation, compliance depth and vertical expertise rather than simple cost arbitrage.

Global Cloud Managed Services Market Trends and Insights

BFSI Digital-First Mandates Intensify Outsourcing

Banks and insurers now place managed cloud services at the core of their modernization roadmaps. In April 2024 Tata Consultancy Services expanded its AWS alliance, pledging to train 25,000 engineers on bank-grade cloud modernization patterns. Institutions view external partners as the only realistic route to embed generative-AI, automate compliance checks and shorten product release cycles. Hybrid set-ups allow next-generation core systems to coexist with legacy platforms, lowering operational risk. Asia-Pacific banks stand out: budget allocations for cloud modernization now outweigh cost-cutting targets as

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customer-experience gains become paramount.

Surge in Multi-Cloud and Hybrid Complexity Among Enterprises

Hybrid and multi-cloud adoption has become mainstream, yet few firms can master cross-platform orchestration internally. VMware reports that 93% of its customers intend to keep hybrid architectures long term. Nutanix finds that 95% of enterprises shifted applications between clouds in 2024 to improve security or speed innovation. The result is a booming need for partners who deliver unified visibility, automated workload placement, and cost governance across cloud estates.

Persistent Data-Breach Anxiety and Evolving Threat Landscape

UK research shows many SMEs still delay cloud migration because of perceived security gaps, even though they acknowledge benefits in flexibility and cost. Compliance audits and customer trust weigh heavily, lengthening deal cycles for providers that cannot produce rigorous certifications and incident-response metrics.

Other drivers and restraints analyzed in the detailed report include:

Heightened Cyber-Risk and Compliance Push 24/7 Managed Security / Cost-Optimization Pressure on CIO Budgets (Op-Ex vs Cap-Ex) / Vendor Lock-In Risks Slow Large-Scale Workload Migration /

For complete list of drivers and restraints, kindly check the Table Of Contents.

Segment Analysis

Managed infrastructure services continue to deliver foundational provisioning, capturing 37.5% of 2024 revenue. Yet managed security services grow faster at 10.7% CAGR as firms prioritize continuous threat hunting, zero-trust enforcement and compliance reporting. The cloud managed services market size for managed security will therefore outpace most other segments. AI-driven security operations centers, such as VikingCloud's platform that analyzes billions of events daily, strengthen provider advantage by shortening dwell time and automating correlation. Network, application, backup and disaster-recovery services remain steady, channeling complex modernization projects and legacy support.

Second-order effects ripple across the cloud managed services industry as providers bundle security with infrastructure and network oversight, creating integrated platforms that raise switching costs. Enterprise buyers value unified dashboards, consistent SLAs and single-pane governance across multi-cloud estates features that independent point solutions struggle to match.

The public-cloud option retains 52% cloud managed services market share in 2024, anchored by hyperscale availability zones and rich native tooling. The hybrid model, however, accelerates at 11.5% CAGR as clients seek latency control, data residency and cost optimization advantages. Use of AWS Outposts by Nomura Research Institute lets Japanese banks run AWS services on-premises to satisfy sovereignty rules. Equinix Japan's partnership with Sakura Internet illustrates how co-location and GPU-ready services blend public economics with private control for AI workloads. Private-cloud growth remains modest, reserved for ultra-low-latency or niche regulatory cases.

Managed-service vendors now differentiate by offering consistent policy engines, cost dashboards and observability across public, private and edge footprints. Clients with strict uptime or data-location mandates increasingly treat provider proficiency in hybrid integration as a purchase prerequisite.

Cloud Managed Services Market is Segmented by Service Type (Managed Infrastructure Services, Managed Network Services, and

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More), Deployment Type (Public Cloud, Private Cloud, Hybrid Cloud), Enterprise Size (Large Enterprise and SMEs), End User Industry (BFSI, IT and Telecom, Retail and E-Commerce, and More), and by Geography. The Market Forecasts are Provided in Terms of Value (USD).

Geography Analysis

North America remains the largest spender, retaining 37.3% share of the cloud managed services market in 2024. Early adoption, mature partner ecosystems and a robust venture funding scene sustain demand for optimization, AI operations and compliance automation. US enterprises favor outcome-based contracts, while Canadian firms leverage cross-border proximity for dual-region resilience. Mexican manufacturers integrate managed edge gateways to underpin Industry 4.0 programs.

Asia Pacific records the fastest 9.3% CAGR through 2030 as governments subsidize digitization and broadband access widens. Huawei Cloud's partner network now counts more than 45,000 firms and 12,000 marketplace offers, linking finance, telecom and AI start-ups across the region. India's IT majors revamp legacy estates for global service exports. Japan's high trust threshold spurs demand for hybrid setups backed by local data centers, while South Korea's 5G backbone accelerates edge-heavy workloads. Australia's isolation intensifies calls for local managed nodes that interconnect seamlessly with global resources, an area where OpenText is investing heavily in 2025.

Europe's regulatory mosaic drives provider differentiation on data-residency and sustainability credentials. Germany's Mittelstand manufacturers tap managed services for Industrie 4.0, while French and Italian public-cloud spend rises under national AI strategies. UK financial institutions commission integrated threat-management suites to align with PRA expectations. The region's Green Deal and CSRD reporting dampen demand for providers without transparent emissions metrics; Microsoft's pledge to power data centers with 100% renewable energy influences sourcing decisions.

South America and the Middle East and Africa represent nascent yet high-potential territories where managed services circumvent limited local infrastructure. Expereo notes businesses boosting spending on SD-WAN and SASE to deliver consistent application performance across geographically dispersed operations.

List of Companies Covered in this Report:

Amazon Web Services (AWS) / Microsoft Corp. (Azure Managed Services) / International Business Machines Corp. (IBM) / Accenture plc / Cisco Systems, Inc. / Huawei Technologies Co., Ltd. / Ericsson / Fujitsu Ltd. / NEC Corp. / NTT DATA Corp. / DXC Technology Co. / Lumen Technologies, Inc. / Rackspace Technology, Inc. / Tata Consultancy Services Ltd. / Wipro Ltd. / HCLTech / Capgemini SE / Cognizant Technology Solutions / Infosys Ltd. / Atos SE /

Additional Benefits:

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

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