

Mainframe Modernization Market 2025-2029: Unveiling Growth Developments with the Latest Updates

The Business Research Company's Mainframe Modernization Global Market Report 2025 – Market Size, Trends, And Global Forecast 2025-2034

LONDON, GREATER LONDON, UNITED KINGDOM, December 3, 2025

[/EINPresswire.com/](#) -- What Is The Expected Cagr For The [Mainframe Modernization Market Through 2025?](#)

The market size for mainframe modernization has expanded speedily over the past few years. A surge is expected from \$15.72 billion in 2024 to \$18.12 billion in 2025 with a compound annual growth rate (CAGR) of 15.2%. The growth during the historical period is due to factors such as increased mainframe maintenance costs, a rise in software licensing fees, growth in banking and telecom transaction volumes, escalating regulatory compliance mandates, and the expanding global scope of business operations.

Expectations point to a swift expansion in the mainframe modernization market size over the coming years, potentially reaching \$31.55 billion by 2029 with a CAGR of 14.9%. Factors contributing to the anticipated growth during the forecast period include increased cost optimization initiatives, heightened targets for operational resilience, a rise in retirements among legacy specialists, increased regulation on data retention and privacy, and an emphasis on sustainability and energy efficiency targets. Looking to the future, trends include advancements in application programming interface-led modernization platforms, innovation in automated code refactoring and code translation technologies, the rise of cloud-native migration accelerators and blueprints, R&D in AI-assisted legacy code understanding, and developments in machine learning-based workload profiling and sizing.

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What Are The [Driving Factors Impacting The Mainframe Modernization Market?](#)

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Which Players Dominate The Mainframe Modernization Industry Landscape?

Major players in the Mainframe Modernization Global Market Report 2025 include:

- Amazon Web Services Inc.
- Google LLC
- Microsoft Corporation
- Accenture plc
- International Business Machines Corporation
- Oracle Corporation
- Tata Consultancy Services Limited
- Fujitsu Limited
- NTT DATA Corporation
- Capgemini SE

What Are The Key [Trends Shaping The Mainframe Modernization Industry?](#)

Key players in the mainframe modernization market are concentrating their efforts on innovative product introductions such as AI-powered modernization services in order to expedite migration and minimize risk. These AI-enabled modernization services make use of generative-to-agentic AI for efficient management of analysis, code conversion, testing, and cutover planning within legacy mainframe estates. For example, Kyndryl Inc., a United States based IT infrastructure services provider, introduced Mainframe Modernization Services in June 2025, harnessing the agentic AI capabilities of Amazon Web Services (AWS Transform for Mainframe). This facilitates faster application and data migration from the mainframe, streamlines modernization tasks to minimize effort and mistakes, and offers advisory and implementation assistance to mitigate the risks associated with cloud transition.

Global Mainframe Modernization Market Segmentation By Type, Application, And Region

The mainframe modernization market covered in this report is segmented –

- 1) By Component: Software, Services, Hardware
- 2) By Deployment Mode: On-Premises, Cloud-Based, Hybrid
- 3) By Enterprise Size: Small And Medium Enterprises, Large Enterprises
- 4) By Application: Core Banking, Risk And Compliance, Payments, Customer Management, Fraud

Detection, Other Applications

5) By End-User: Banking, Financial Services, And Insurance (BFSI), Healthcare, Retail, Government, Manufacturing, Information Technology And Telecom, Other End-Users

Sub Segment:

1) By Software: Application Modernization Tools, Code Refactoring Tools, Automated Code Analysis Platforms, Middleware And Integration Software, Application Programming Interface Management Platforms

2) By Services: Consulting Services, Assessment And Roadmapping Services, Application Modernization Services, Replatforming And Rehosting Services, Cloud Migration Services

3) By Hardware: Enterprise Mainframe Systems, Compute Accelerators, Storage Systems, Input Output Subsystems, Networking Equipment

View the full mainframe modernization market report:

<https://www.thebusinessresearchcompany.com/report/mainframe-modernization-global-market-report>

Which Region Holds The Largest Market Share In The Mainframe Modernization Market?

In the Mainframe Modernization Global Market Report 2025, North America emerged as the dominant region in 2024. The report also anticipates that the Asia-Pacific region will experience the most rapid growth during the forecast period. The geographic areas detailed in the study include Asia-Pacific, Western Europe, Eastern Europe, North America, South America, Middle East, and Africa.

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Speak With Our Expert:

Saumya Sahay

Americas +1 310-496-7795

Asia +44 7882 955267 & +91 8897263534

Europe +44 7882 955267
Email: saumyas@tbrc.info

The Business Research Company - www.thebusinessresearchcompany.com

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Oliver Guirdham

The Business Research Company

+44 7882 955267

info@tbrc.info

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