Application Control - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts 2019 - 2029

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Report description:

The Application Control Market size is estimated at USD 1.68 billion in 2024, and is expected to reach USD 2.11 billion by 2029, growing at a CAGR of 4.59% during the forecast period (2024-2029).

The rising number of cyberattacks and considerable growth in connected devices and access points has significantly raised the demand for superior business application monitoring and control. As a result, the demand for comprehensive end-point access protection and coverage has increased dramatically, gaining popularity across a wide range of industry verticals.

Key Highlights
-The growing number of cyberattacks, combined with an increase in connected devices and access points, has significantly raised the demand for enhanced monitoring and control of enterprise applications. As a result, the demand for comprehensive end-point access security and coverage has increased dramatically, gaining popularity across a wide range of industry verticals. As a result, various market participants in the application control market presently offer extensive business products that permit advanced protection of enterprise applications by enabling varying degrees of control, such as execution, monitoring, and authentication, among other controls.
-Further, the application control-based solutions offer a broad range of uses, including network security, server management, end-point protection, and authentication, among other benefits to the end-user organization. Application control has gained significant traction in the past few years, primarily owing to the rising need for load balancing, improving performance, and handling much more advanced requirements associated with application delivery. These solutions provide availability, scalability, performance, security, automation, and control essential to keep the applications and servers running in their power band.
-These capabilities also aid organizations that want to or have already migrated to the cloud environments. Digital transformation has been inspiring new architectures and optimization initiatives. It significantly impacts ADCs as they are crucial to application

architectures and IT optimization. For example, almost any E-commerce website uses an application delivery controller to improve the availability and reliability of its applications. Currently, businesses have been undergoing digital transformation as their enterprise counterparts. Website reliability, flexibility, scalability, and performance are as essential to website infrastructure as they are to an enterprise.

-The exponential explosion in data traffic has been demanding that network systems be capable of handling the increasing rates of application layer traffic. The solutions offered in the market must handle these types of huge loads. The increasing need to scale out applications, which in various cases consists of solutions from different vendors, along with adding new services to the network, can result in increased complexities and increased points of failure in the network. As a result, delivering these services to the consumers becomes more complex and can result in major delays, leading to loss of revenue streams and lowered subscriber quality of experience.

-The global COVID-19 pandemic caused long-term impacts in various major IT and technology sectors. For example, several IT and other big technology organizations anticipated fewer commercial contracts across various industrial verticals such as manufacturing, service sector, healthcare, and retail. However, due to their importance in utilities and necessary everyday operations, critical businesses such as BFSI, IT & telecom, aerospace & defense, and others experienced minor impacts during the pandemic across different nations.

Application Control Market Trends

Retail is Expected to Hold the Significant Share of the Market

- With the improvement of the Web, the development of multi-channel operations, and the evolution of intelligent retail application solutions, the retail market has become dynamic. Moreover, with the rapid rise of e-commerce, business intelligence is being enabled to track how users interact with e-Commerce stores, and this information can be used further to enhance the customer shopping and service experience. E-Commerce also allows retailers to make smart, efficient decisions based on customer behavior. This data can be viewed in real-time, allowing businesses to adjust prices quickly or alter merchandise offerings. Such developments increase the attraction towards online shopping, and retailers are adopting Application Controller to reduce load times.

- The number of IoT-connected devices in the retail sector is exponentially increasing. For instance, in the EU region, the number of connected devices used in the retail industry was 2.28 million units in 2019, and it is expected to grow to 3.09 million units by 2025, as per the ENTO reports. Also, Amazon opened Amazon Go, a physical grocery store near its Seattle headquarters. The brick-and-mortar store uses a broad network of newly designed cameras, sensors, and smartphones to determine the exact product each consumer takes off a shelf. After identifying the product, the technology adds it to a digital cart. Such developments in the retail sector increase the need for ADCs to improve scalability and reduce server workload traffic.

- Furthermore, retailers are investing in multi-cloud, multi-location, and multi-platform load balancing strategies where visitors to the retail mobile application sites might view the content in different languages depending on the customers based on the country they are located in. Therefore, such capabilities attract more customers worldwide, and to reduce the server workload, ADCs are being adopted.

- The need for regulatory compliance for servers located in different locations, such as GDPR in the European Union, for governing data security and privacy also demands the ADCs in retail sectors. Overall, the demand for ADC increases across the studied sector with the increased incorporation of IoT and the introduction of digital technologies in retail to automate payments and other transactions faster.

- E-commerce applications can be controlled through various means to ensure proper functionality and security. Some commonly used controls in business processes include access controls, data encryption, audit trails, and firewalls. The rise in online spending would allow the studied market to grow. For instance, according to Salesforce, In the fourth quarter of 2022, online shoppers across all verticals spent an average of slightly under three dollars per visit. Food and beverage is the category in which

consumers spend the most money each visit on average, at more than four dollars, followed by luxury clothes at almost USD 3.5.

North America is Expected to Dominate the Market

- North America is a primary hub for all the major organizations worldwide; hence, the expansion and growth in these industries, coupled with increased adoption of technology across these industries, is driving the demand for the deployment of applications amongst enterprises in the region. Thus, securing the data has become a priority in the region, increasing the adoption of application control solutions.
- The increasing adoption of cloud-based applications has also increased the demand for regional data centers. For instance, according to a report published by Cloudscene in January 2021, Microsoft offers 18 cloud on-ramps in data centers in North America, followed by Amazon, Google, Alibaba, and IBM with 18, 11, 10, and 9 cloud on-ramps in data centers, respectively. Moreover, the rising cybersecurity threats across the region have further encouraged businesses to opt for more agile and cost-effective application delivery controllers, which are scalable and secure, and increase visibility over data traffic and movement across the users.
- The region has many leading Application Delivery Controller solution provider companies, such as F5 Networks, Fortinet, Juniper Networks, A10 Networks, and Array Network. Market players in the region are keeping up with digital innovations and business demands by launching new solutions. For instance, Fortinet launched FortiADC 6.1 to accelerate applications and deliver advanced security services.
- Several companies are working on innovative solutions to tap into the growing SME sector in the region, looking for cost-effective cloud-enabled solutions for their businesses. For instance, Snapt, the pioneering application security, visibility, and control company, recently launched Nova Version 2, the second generation of Snapt's centralized ADC platform. This cloud-based ADC includes a load balancer, WAF, GSLB, and web accelerator. Nova is a hyper-scale-ready, centralized platform for deploying, controlling, and monitoring ADCs at scale.
- In July 2022, in the second quarter of 2022, firms of all sizes chose SAP to support their cloud transitions, according to a statement from SAP. This indicated that the RISE with SAP solution continued to enjoy a high rate of acceptance across businesses in North America. Hundreds of companies chose RISE with SAP in the first part of the year, with public cloud deployments becoming increasingly popular among customers.

Application Control Industry Overview

 The competitive landscape of the Application Control Market is moderately fragmented owing to the presence of several solution providers across the globe. These solution providers are increasingly innovating to provide enhanced solutions in the market. The market players are also strategically collaborating to strengthen their global foothold and market presence.

 In April 2023, Nokia released four third-party MX Industrial Edge (MXIE) applications to assist organizations in connecting, collecting, and analyzing data from operational technology (OT) assets on a strong and secure on-premises edge. Asset-heavy sectors will benefit the most from Nokia's OT edge ecosystem-neutral approach, which taps into innovation from many leading digitalization enablers. The new apps also use the recently released GPU functionality on Nokia MXIE. This powerful on-premises OT edge solution helps process data closest to the source in real-time while maintaining data sovereignty.

 In October 2022, Accenture and Google Cloud announced an expansion of their global partnership, including a renewed commitment to growing their respective talent pools, expanding their joint capabilities, developing new data and AI solutions, and providing enhanced support to help clients build a strong digital core and reinvent their enterprises on the cloud.

Additional Benefits:

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

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