Thin Client - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts 2019 - 2029

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

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Report description:

The Thin Client Market size is estimated at USD 1.35 billion in 2024, and is expected to reach USD 1.5 billion by 2029, growing at a CAGR of 2.10% during the forecast period (2024-2029).

The thin client market is anticipated to grow during the forecast period, primarily due to the advantages, such as cost reduction and lesser energy consumption, centralized and accessible manageability, and the enhanced infrastructure security these devices offer.

Key Highlights
-Various industries seek low-cost devices that significantly decrease desk space and offer an easy replacement/upgrade for conventional systems. The thin client systems qualify for these requirements. They can also reduce energy consumption over a period, which is the primary reason for the increasing demand for these devices in various industries. The healthcare industry is also witnessing an extensive adoption of these devices as a computing solution, owing to their security benefits. In contrast, the IT and telecom industry is installing these devices primarily to facilitate the development of a virtual network. Implementing thin client devices in enterprises or other areas can provide better security-related advantages, as they limit the user from any intrusion in a local machine setting. This application renders the system more secure and protected.
-Various educational institutions, such as colleges, research institutes, and labs, are increasingly adopting thin client solutions to control the monitors centrally at the IT control department, thereby reducing energy consumption. These devices also decrease the cost of system upgrades and the time consumed in setting up the PC or laptop at each login.
-The growing adoption of cloud computing is also driving market growth. Several organizations use cloud computing to reduce costs and access the data and applications not installed on the computers or servers. Clouds emerged as an infrastructure that may enable the rapid delivery of computing resources as a utility in a dynamically scalable and virtual manner. Various

organizations across the world are moving to a hybrid and multi-cloud environment. A thin client contributes to a comparatively less expensive and secure hardware solution, driving the market's growth.

-With the rising adoption of workspace-as-a-service (WaaS) in several enterprises, the market is anticipated to witness augmented demand during the forecast period. WaaS is a desktop virtualization used by multiple organizations to provide their employees access to applications remotely. However, network issues in developing countries for cloud computing are expected to restrain the growth of the studied market.

-Energy companies operating in a geopolitically sensitive industry face frequent cyberattack targets, especially from foreign governments. However, using the cloud as a base for desktop virtualization allows sensitive information to be stored centrally, and authentication policies can be set to secure the cloud environment. This factor is anticipated to generate demand for the thin client market.

-The trend toward remote work has been steadily growing for the past decades. However, the effect of COVID-19 dramatically accelerated this trend in an extremely short period, forcing companies, irrespective of their size, to adapt quickly to the self-isolation measures recommended by governments worldwide. With the pandemic requiring more people to be working remotely, the concern regarding the security of data sharing among employees increased. This has been driving the adoption of the demand for thin-client devices.

Thin Client Market Trends

The Healthcare Segment is Expected to Drive the Market's Growth

- Healthcare providers are stringent in offering the highest standards of patient care. They are acutely attuned to the technologies they use to improve the patient experience at every stage of care. From admissions to the emergency room to rehabilitation and outpatient care, the technology can significantly impact patient outcomes and critically impact providers' productivity and operational costs. This holds especially true for the ubiquitous desktop computing infrastructure across the healthcare domain. The legacy desktop PC model, data, and applications reside locally on individual PCs distributed across the network, often yielding a cluster of individually configured and managed PCs. These are associated with sensitive patient data, often with little to no parameter uniformity.

- However, with thin clients, data and applications are remotely administered, stored, and centralized in the data center or cloud infrastructure. The thin client is simply the access portal, giving administrators and clinicians immediate access to their applications and patient data as their credentials allow.

- By the nature of their architecture, thin clients offer various security advantages to help ensure compliance with HIPAA and other healthcare regulations while minimizing exposure to security threats. Authorized user access to cloud-based data and applications is strictly controlled via user authentication and permissions verification. USB/port protections, smart cards, and firewalls can further augment these security measures.

- Although the industry is currently transitioning into digitization, it has been notoriously recognized to be resistant to changes since any failure of unreliable technology translates into issues that affect patient health. Any deviation from predetermined workflows can adversely affect a hospital's operations. Despite the hesitancy, the industry must accelerate technology adoption to remain compliant with the constantly changing regulations and agreements.

- Such needs have encouraged robust partnership structures designed around maximizing offering capabilities. For instance, in March 2023, Stratodesk, the pioneer of securely managed endpoints for modern workspaces, announced that several LG Business Solutions Thin Clients are now certified with Stratodesk NoTouch OS, providing IT teams with the confidence and flexibility to deploy the turnkey devices from both private and public clouds. Stratodesk makes it easier for joint customers to stay productive from anywhere using Windows or non-Windows business software that they are familiar with by automating the delivery of the latest applications and web technologies.

North America is Expected to Hold a Major Market Share

- North America is expected to dominate the market, primarily due to the factors such as the increasing adoption of cloud technology and highly technology-oriented products, which require activity and flexibility. IT support is available to the majority of companies in the region. The presence of market leaders, a significant number of cloud service providers, and an increasing number of hosted servers in the area are essential contributors to the market's growth in the region.
- The organizations in the region are early adopters of new technologies, which is the primary driving force behind the region's dominance. Large cloud service providers play a significant role in the region's growth of cloud-based thin client deployment.
- Cloud computing and virtualization are becoming increasingly important in broadcasting. The physical hardware available on site can be optimally supplemented by virtual machines and computers, remotely accessed via network protocols.
- The North American IT and telecommunications industry is one of the largest among other regional markets. Industries such as banking, healthcare, and government organizations, which handle a large amount of sensitive information, are looking forward to adopting thin client solutions. They can preserve the integrity of the intellectual property better than a fat client.
- Hardware development has also been considerably worked on, with regular competitive releases by vendors. In February 2022, OnLogic, an IGEL Ready program partner, announced the availability of the new IGL130 and IGL160 IGEL Ready thin clients. These new systems, which feature fanless thermal management and AMD Ryzen Embedded processing, combine the performance of IGEL's famous Universal Desktop line of hardware with OnLogic's dependable operation derived from its industrial application lineage. The product is expected to register an initial release in the States before working towards overseas markets.

Thin Client Industry Overview

 The thin client market is highly competitive due to the presence of many large players in the market providing products in the domestic and international markets. The market appears to be mildly concentrated, with the key players adopting strategies like product and service innovations, partnerships, mergers, and acquisitions to extend their geographic reach and stay ahead of the competitors. Some of the major players in the market are Dell Inc., H.P. Development Company LP, Samsung Group, and L.G. Electronics Inc.

- October 2022: Centerm and Kaspersky signed an agreement to collaborate on Cyber Immune Endpoints. Kaspersky plans to provide the KasperskyOS operating system and related cyber immune products and solutions as part of the collaboration, while Centerm plans to provide hardware.
- August 2022: The 7500q thin client series was introduced by 10ZiG. It has an Intel Quad Core processor with 1.10 to 2.60 GHz (Burst), a 15.6" display, FHD (1920 x 1080), a 16:9 panel, 8GB DDR4 2,666 MHz RAM, 2 x USB Port 2.0, 1 x USB Port 3.0, 1 x USB Port C, 1 x HDMI, and 1 x SD Card Reader, and a battery life of up to 10 hours.

Additional Benefits:

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

Table of Contents:

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