Enterprise Networking Market by Networking Devices (Routers, Switches, Firewalls, Access Points), Technology (SDN, SD-WAN, SASE, Intent-Based Networking), Network (Branch, Remote, Campus, Datacenter), Connection (Wired, Wireless) - Global Forecast to 2029

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Report description:

The Enterprise Networking Market was estimated to be USD 115.8 billion in 2024 to USD 175.2 billion by 2029 at a Compound Annual Growth Rate (CAGR) of 8.6%. This market growth of the enterprise networking market is majorly due to some prominent factors such as increased demand of cloud services, growing needs of efficient data management, adoption of AI/ML solutions to automate network management tasks, and the rising trend of network virtualization. These factors have not only fueled the wider adoption of the enterprise networking solutions but also have enabled more efficient resource utilization and simplified management of the enterprise infrastructures. Additionally, this growth is also driven by factors such as growing adoption of IoT devices, the push for digital transformation, as well as the rising cybersecurity concerns. Various enterprise networking software such as network automation, network virtualization network security solutions such as SASE, and others further foster the growth of the enterprise networking market by addressing the key needs such as automation, efficiency, security, and flexibility required in the IT infrastructures. Furthermore, the integration of SD-WAN and SASE solutions has boosted the growth of the market, as enterprises are shifting their focus from only SD-WAN towards a more converged approach, such that all other aspects of the network security are well addressed with deployment of a single solution. These factors have caused a surge in the demand of Enterprise Networking solutions and have created a significant momentum for the growth of the Enterprise Networking solutions and services.
"The service providers segment is expected to have largest market size during the forecast period." In the end users, the service-based segment, which includes cloud service providers and telecom service providers, is expected to grow the most in the enterprise networking market since enterprises are becoming increasingly dependent on outsourced IT and networking solutions.

Cloud service providers are highly sought after as enterprises shift toward cloud-based infrastructures for scalability, flexibility, and cost efficiency. Greater adoption of SaaS, PaaS, and IaaS further fuels this segment's growth. On the other hand, the roll-out of 5G networking enables advanced networking solutions required data-traffic levels to accommodate these technologies and other future developments like IoT and edge computing on which the operators are placing much focus. The nonstop evolution in digital services, coupled with the requirements for secure and high-performance networking, places service-based as a key growth driver of the enterprise networking market.

"The data center network segment will witness the highest growth during the forecast period." The fast growth of the data center network segment in the enterprise networking, can be mainly attributed to the demand for solutions in cloud computing, big data analytics, and storage. Furthermore, the migration of enterprise workload to cloud-based infrastructure is a key demand driver for data center networks hosting superior robustness and performance. The growth in digital services, e-commerce, and streaming platforms, all tending toward high performance, is calling for hyperscale data centers. Further, increasing efficiency and scalability of data center networks are driven by virtualization, SDN, and NFV, which become necessary for managing ever-increasing volumes of data and workloads. In the long run, data center networks are going to be core enablers of enterprise networking.

"Asia Pacific's highest growth rate during the forecast period."

The Asia Pacific region is witnessing an increasing adoption of digital technologies by the developing economies in the region. Countries in the region are undergoing through several digital transformation initiatives as the businesses and service providers are constantly seeking the scalable and flexible solutions in order support their growth strategies. The region is also undergoing through rapid urbanization and has high internet penetration, along with the rapidly growing investments in the telecom and cloud computing sectors. These factors contribute to the growth of the Asia-Pacific region over the forecasted period. Moreover, the countries in the regions are backed by strong government initiatives and rapid infrastructure development that also majorly contribute to the overall growth of the region. Additionally, the region is also witnessing a rise in the number of SMEs, which thereby indicates the higher adoption of sophisticated enterprise networking solutions and therefore leading to high adoption of cloud-based services. Owing to these factors, the Asia-Pacific region is expected to register the highest growth during the forecast period.

Breakdown of primaries

The study contains insights from various industry experts, from solution vendors to Tier 1 companies. The break-up of the primaries is as follows:

- By Company Type: Tier 1 - 35%, Tier 2 - 45%, and Tier 3 - 20%
- By Designation: C-level -35%, D-level - 25%, and Others - 40%
- By Region: North America - 30%, Europe - 30%, Asia Pacific - 25%, Middle East & Africa - 10%, and Latin America- 5%.

The major players in the Enterprise Networking market include Cisco Systems (US), Broadcom (US), Hewlett Packard Enterprise (US), Juniper Networks (US), Extreme Networks, Inc. (US), Huawei (China), Fortinet (US), Cloudflare, Inc. (US), Alcatel-Lucent Enterprise (France), Arista Networks (US), Riverbed Technology (US), Check Point Software Technologies Ltd. (Israel), SolarWinds Corporation (US), F5 Networks (US), Palo Alto Networks (US), Pica8 (US), Versa Networks (US), Aryaka Networks Inc. (US), A10 Networks, Inc. (US), Cato Networks Ltd. (Israel), Cambium Networks (US), Megaport (Australia), flexiWAN (Israel), Peplink (US), Lavelle Networks (India), and Bigleaf Networks (US). These players have adopted various growth strategies, such as partnerships, agreements and collaborations, new product launches, enhancements, and acquisitions to expand their Enterprise Networking market footprint.

Research Coverage

The market study covers the Enterprise Networking market size across different segments. It aims at estimating the market size and the growth potential across different segments, including offerings, end user, network, deployment mode, connection type, technology, and region. The offerings are sub-segmented into networking devices, networking software, and services. The offerings segment is further categorized into Networking devices (Routers, Switches, Access Points, Gateways, Firewalls, and

Other Networking Devices [servers, and load balancers]), networking software (Network Management & Monitoring, Network Security, Network Virtualization, Network Automation, and Other Networking Software [network analytics and collaboration tools]), and services. The services segment covers professional and managed services. The professional service segment has been further segmented into consulting, deployment & integration, and support & maintenance. The end-users studied under the Enterprise Networking market include service providers and enterprises, where enterprises are further segmented into BFSI, IT & ITeS, Manufacturing, Healthcare & Life Sciences, Retail & eCommerce, Transportation & Logistics, Government, Media & Entertainment, Education, and Other Enterprises (Energy & Utilities and Travel & Hospitality). Based on network the market is categorized into Branch network, remote network, campus network, and data center network. Further, based on the connection type, market is categorized into wired and wireless. Based on technology the market has been categorized into Software-Defined Networking (SDN), Network Function Virtualization (NFV), Software-Defined Wide Area Network (SD-WAN), Secure Access Service Edge (SASE), Wi-Fi, Intent-based Networking (IBN), and Other Technologies (Cloud Networking, AI Networking, And Edge Computing). The regional analysis of the Enterprise Networking market covers North America, Europe, Asia Pacific, the Middle East & Africa, and Latin America. The study includes an in-depth competitive analysis of the leading market players, their company profiles, key observations related to product and business offerings, recent developments, and market strategies.

Key Benefits of Buying the Report

The report will help the market leaders/new entrants with information on the closest approximations of the global Enterprise Networking market?s revenue numbers and subsegments. This report will help stakeholders understand the competitive landscape and gain more insights to position their businesses better and plan suitable go-to-market strategies. Moreover, the report will provide insights for stakeholders to understand the market?s pulse and provide them with information on key market drivers, restraints, challenges, and opportunities.

The report provides insights on the following pointers:

1. Analysis of key drivers (increasing focus on advanced cybersecurity measures, growing shift toward cloud-based services, adoption of AI/ML solutions to automate network management tasks), restraints (high initial investments and managing the costs of WAN links), opportunities (implementation of zero trust security architecture, growth in edge computing, introduction of quantum-safe networks), and challenges (complex network environments, regulatory and compliance issues) influencing the growth of the Enterprise Networking market.
2. Product Development/Innovation: Detailed insights on upcoming technologies, research & development activities, and new product & service launches in the Enterprise Networking market.
3. Market Development: Comprehensive information about lucrative markets - the report analyses the Enterprise Networking market across various regions.
4. Market Diversification: Exhaustive information about new products & services, untapped geographies, recent developments, and investments in the Enterprise Networking market.
5. Competitive Assessment: In-depth assessment of market shares, growth strategies and service offerings of leading players Cisco Systems (US), Broadcom (US), Hewlett Packard Enterprise (US), Juniper Networks (US), Huawei (China), Cloudflare(US), Arista Networks (US), Alcatel-Lucent Enterprise (France), Extreme Networks, Inc. (US), Riverbed Technology (US), Check Point Software Technologies (Israel), SolarWinds (US), Fortinet (US), Palo Alto Networks (US), Pica8 (US), Versa Networks (US), Aryaka Networks Inc., (US), F5 Networks (US), flexiWAN (Israel), Peplink (US), Lavelle Networks (India), A10 Networks (US), Cato Networks (Israel), Cambium Networks (US), Megaport (Australia), and Bigleaf Networks (US).

Table of Contents:

Enterprise Networking Market by Networking Devices (Routers, Switches, Firewalls, Access Points), Technology (SDN, SD-WAN, SASE, Intent-Based Networking), Network (Branch, Remote, Campus, Datacenter), Connection (Wired, Wireless) - Global Forecast to 2029

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