

## **Cloud VPN - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts (2025 - 2030)**

Market Report | 2025-06-01 | 120 pages | Mordor Intelligence

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### **Report description:**

Cloud VPN Market Analysis

The Cloud VPN Market size is estimated at USD 13.05 billion in 2025, and is expected to reach USD 36.45 billion by 2030, at a CAGR of 22.80% during the forecast period (2025-2030). The 179% growth trajectory reflects enterprise migration from perimeter-bound security to cloud-native architectures, escalating multi-cloud connectivity needs, and permanent hybrid work patterns. Demand also benefits from the rapid rollout of Secure Access Service Edge (SASE) platforms, 5G private networks for industrial IoT, and vendor bundling of VPN with unified security suites. Competitive intensity rises as legacy network vendors converge with cloud-first security specialists, while persistent skills shortages in cloud-security engineering reinforce the shift toward managed offerings. Country-level data-sovereignty mandates introduce deployment complexity yet encourage regionalized platforms that can meet compliance obligations.

Global Cloud VPN Market Trends and Insights

Surge in Multi-Cloud Adoption

Enterprise multi-cloud strategies reshape VPN requirements as organizations look for unified connectivity across disparate clouds. Cisco reported 117% security revenue growth in Q2 FY 2025, largely tied to multi-cloud connectivity demands. Traditional site-to-site architectures struggle with dynamic cloud workloads, fueling the uptake of cloud-native solutions that spin up tunnels on demand. Salesforce gained 500% bandwidth without extra cost after adopting Prisma SD-WAN across 70 offices. Unified SASE

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platforms that abstract provider differences reduce operational friction and lower vendor-lock-in risk, a priority for global enterprises that want future cloud strategy flexibility.

## Expansion of SASE and Zero-Trust Architectures

Identity-centric security is displacing network-centric VPN in many enterprises. T-Mobile replaced legacy VPN with Zscaler's Zero Trust Exchange, enabling direct application access and lower latency. SASE eliminates back-hauling through data centers, improves user experience, and supports least-privilege policies. CISA highlighted 22 VPN vulnerabilities in 2024, accelerating migration. Converged networking and security within SASE delivers operational efficiency that offsets higher per-user spend compared to appliance-based VPN.

## Growing Preference for Clientless ZTNA over VPN

Zscaler's 2025 VPN Risk Report found 92% of organizations are concerned about ransomware exposure via VPN, and 65% intend to replace VPN within a year. Clientless ZTNA provides application-specific access without network-wide exposure, reducing attack surface and device management overhead. Telit Cinterion realized a threefold ROI by migrating from Pulse Secure VPN to Prisma Access. Traditional VPN vendors must pivot to zero-trust or risk displacement.

Other drivers and restraints analyzed in the detailed report include:

Work-from-Anywhere Labour Model Persists / 5G Private Networks for Industrial IoT / Country-Level Data-Sovereignty Compliance Hurdles /

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

## Segment Analysis

Software still underpins 62.7% of 2024 revenue as large enterprises keep granular control over policy management. Managed services, however, deliver the strongest upside at a 25.3% CAGR to 2030 as organizations contend with hiring gaps and operational complexity. The cloud VPN market size for services is projected to widen sharply, buoyed by subscription models that bundle 24/7 monitoring, incident response, and compliance reporting. Providers showcase rapid deployment; Watercare enabled Zscaler Private Access for 800 users across 1,300 sites in half a day. The segment's growth also links to multi-cloud sprawl, where specialized skills are necessary to optimize performance across diverse platforms.

Managed-service adoption spreads across verticals. Healthcare providers seek turnkey options due to stringent data privacy mandates, while mid-sized manufacturers rely on MSPs to secure distributed plants. Vendors invest in automation and AI-powered analytics to scale support without proportionally expanding headcount. As economies of scale strengthen, service pricing narrows relative to self-managed software licensing, improving total-cost-of-ownership for resource-constrained buyers. The services boom contributes repeatedly to overall cloud VPN market momentum during the forecast horizon.

Public cloud maintains 45.3% 2024 revenue share, yet hybrid deployments grow at 24.2% CAGR because enterprises balance on-prem control with cloud scalability. The cloud VPN market recognizes hybrid as the architectural sweet spot, enabling phased migration of legacy applications. Cisco's private 5G overview shows how hybrid models achieve five-nines availability while keeping sensitive data on-site. Hybrid adoption is strongest in regulated industries that must maintain data residency yet require ubiquitous application access.

Unified policy orchestration across hybrid footprints is a central customer requirement. Vendors integrate centralized control

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planes capable of translating intent into device-neutral configurations, reducing manual errors. Hybrid strategies also assist in cost optimization, allowing workload placement based on latency, data gravity, and regulatory needs. Over time, as cloud activity outweighs on-prem workloads, hybrid may transition toward predominately public cloud, but demand for adaptive, location-agnostic VPN persists, driving continued cloud VPN market expansion.

Cloud VPN Market is Segmented by Component (Software and Services), Deployment Mode (Public Cloud, Private Cloud, and Hybrid Cloud), Enterprise Size (Small and Medium Enterprises and Large Enterprises), VPN Type (Remote-Access VPN, Site-To-Site VPN, and Extranet VPN), End-User Industry (Government and Public Sector, IT and Telecommunication, BFSI, and More), and Geography. The Market Forecasts are Provided in Terms of Value (USD).

### Geography Analysis

North America led with 34.6% revenue share in 2024 as early adopters invested heavily in cloud-native security. Federal zero-trust mandates and CISA guidance steer organizations toward modern access models. Large enterprises allocate significant budgets; Palo Alto Networks posted 37% Next-Generation Security ARR growth with strong regional contribution. Canada follows similar modernization paths, and cross-border trade with Mexico boosts multinational connectivity projects.

Asia-Pacific is the fastest-growing region at 25.1% CAGR through 2030. Sovereign cloud initiatives drive compliant solutions; 64% of Australian enterprises explore data-sovereignty strategies. China and India ramp up industrial IoT and digital-government projects, necessitating secure multi-site access. Japan tightens personal data rules, spurring demand for in-country gateways. Telecom operators leverage 5G build-outs to offer bundled VPN-as-a-Service to enterprises. As skill shortages intensify, managed service uptake accelerates across the region, further enlarging overall cloud VPN market revenue.

Europe records steady growth anchored by GDPR and cyber-resilience directives. Germany emphasizes OT security for Industry 4.0, while the United Kingdom targets financial services compliance. France advances digital-sovereignty measures that favor European cloud providers with integrated VPN offerings. Russia's data-localization rules encourage domestic gateways but hinder global providers. Overall, regulatory complexity incentivizes flexible, policy-driven VPN designs.

The Middle East and Africa show emerging potential. The United Arab Emirates and Saudi Arabia allocate sizable budgets for smart-city and e-government initiatives, seeking carrier-grade SASE and VPN solutions. South Africa and Nigeria experience uptake as cloud adoption spreads among enterprises. Telcos bundle VPN with fiber and 5G for SMEs, lifting penetration rates. Although current revenue contribution is modest, high growth rates translate into notable incremental demand, complementing the broader cloud VPN market expansion.

### List of Companies Covered in this Report:

Cisco Systems Inc. / Microsoft Corporation / Amazon Web Services Inc. / Google LLC / Huawei Technologies Co. Ltd. / Palo Alto Networks Inc. / Fortinet Inc. / Check Point Software Technologies Ltd. / Cloudflare Inc. / Zscaler Inc. / Cato Networks Ltd. / Barracuda Networks Inc. / OpenVPN Inc. / Perimeter 81 Ltd. / Versa Networks Inc. / Array Networks Inc. / NCP engineering GmbH / Cohesive Networks LLC / Robustel Tech Co. Ltd. / Singtel Ltd. / AppGate Inc. / PureVPN (GZ Systems Ltd.) / SaferVPN / Nord Security Inc. / NetMotion Software by Absolute /

### Additional Benefits:

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

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6.4.4 Google LLC

6.4.5 Huawei Technologies Co. Ltd.

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6.4.11 Cato Networks Ltd.

6.4.12 Barracuda Networks Inc.

6.4.13 OpenVPN Inc.

6.4.14 Perimeter 81 Ltd.

6.4.15 Versa Networks Inc.

6.4.16 Array Networks Inc.

6.4.17 NCP engineering GmbH

6.4.18 Cohesive Networks LLC

6.4.19 Robustel Tech Co. Ltd.

6.4.20 Singtel Ltd.

6.4.21 AppGate Inc.

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