

# **Global Software-defined Anything (SDx) Market Size study & Forecast, by Type (Software Defined Infrastructure, Software Defined Networking, Software Storage, Software Defined Security), Deployment Model (On-Premises, Cloud-Based), End User (IT and Telecommunications, Manufacturing, Healthcare, Financial Services), Application (Network Virtualization, Storage Optimization, Security Automation, Data Center Management) and Regional Forecasts 2025-2035**

<https://marketpublishers.com/r/GEB89EEAE96DEN.html>

Date: September 2025

Pages: 285

Price: US\$ 3,750.00 (Single User License)

ID: GEB89EEAE96DEN

## **Abstracts**

The Global Software-defined Anything (SDx) Market is valued at approximately USD 62.77 billion in 2024 and is anticipated to expand at a CAGR of more than 15.92% over the forecast period 2025-2035. SDx represents a transformative paradigm in which hardware-centric IT functions are abstracted and delivered via software, thereby creating a highly agile, flexible, and cost-optimized computing environment. It encompasses software-defined infrastructure, networking, storage, and security solutions that collectively allow enterprises to streamline operations, automate workflows, and scale dynamically. The market expansion is predominantly steered by the accelerating digital transformation initiatives across enterprises, mounting demand for cloud-native technologies, and the need for more adaptive and programmable IT frameworks. Furthermore, the pursuit of operational efficiency and the growing emphasis on lowering capital expenditures are fueling the rapid uptake of SDx solutions worldwide.

As enterprises accelerate their adoption of next-generation applications, the demand for SDx has surged to unprecedented levels. Organizations across industries are rethinking their IT strategies to accommodate hybrid and multi-cloud environments, which require greater scalability and agility than traditional IT infrastructures can provide. According to industry reports, the global cloud services market is expected to surpass USD 1 trillion before 2030, and this shift is directly catalyzing the growth of SDx ecosystems. Moreover, the integration of AI-driven automation and intent-based networking into SDx offerings is opening fresh growth avenues, while persistent security concerns and the need for compliance-ready solutions are further reinforcing the market's momentum. However, the lack of standardized frameworks and the complexities in transitioning legacy systems remain significant restraints during the forecast period of 2025-2035.

The detailed segments and sub-segments included in the report are:

By Type:

Software Defined Infrastructure

Software Defined Networking

Software Storage

Software Defined Security

By Deployment Model:

On-Premises

Cloud-Based

By End User:

IT and Telecommunications

Manufacturing

Healthcare

Financial Services

By Application:

Network Virtualization

Storage Optimization

Security Automation

Data Center Management

By Region:

North America

U.S.

Canada

Europe

UK

Germany

France

Spain

Italy

Rest of Europe

## Asia Pacific

China

India

Japan

Australia

South Korea

Rest of Asia Pacific

## Latin America

Brazil

Mexico

## Middle East & Africa

UAE

Saudi Arabia

South Africa

Rest of Middle East & Africa

Among the segments, Software Defined Networking (SDN) is expected to dominate the market owing to its crucial role in enabling network programmability, reducing hardware dependency, and improving bandwidth efficiency. The rising demand for dynamic and scalable networking solutions that can handle the exponential growth of data traffic positions SDN at the forefront of the SDx ecosystem. Enterprises are increasingly leveraging SDN to gain real-time visibility and automate network provisioning, thereby

ensuring superior user experiences and improved operational agility. Meanwhile, the emergence of 5G and IoT ecosystems is set to reinforce SDN's central role in modern enterprise IT infrastructures.

On the revenue front, cloud-based deployment models currently contribute the largest share to the global SDx market. Organizations are migrating critical workloads to cloud environments due to the compelling advantages of reduced upfront infrastructure costs, improved scalability, and simplified IT management. Cloud-driven SDx solutions also offer enterprises the flexibility to deploy applications across multi-cloud and hybrid ecosystems seamlessly. Although on-premises models remain relevant for organizations with stringent data compliance and security concerns, the cloud-based segment is projected to accelerate further, driven by SaaS adoption, DevOps initiatives, and enterprise cloud strategies.

Geographically, North America dominated the market in 2025 with the largest share, attributed to the region's mature digital infrastructure, high cloud adoption rates, and presence of leading SDx vendors. The United States, in particular, has been at the epicenter of SDx innovation, driven by early enterprise adoption and continuous R&D investments. Europe is also exhibiting robust growth, underpinned by the region's stringent data protection regulations and rising investments in cybersecurity-focused SDx solutions. However, Asia Pacific is anticipated to emerge as the fastest-growing region during the forecast period. Rapid digitization, the proliferation of mobile-first economies, and aggressive investments in 5G and cloud-native infrastructure in countries such as China and India are propelling the regional SDx adoption trajectory.

Major market players included in this report are:

IBM Corporation

Cisco Systems Inc.

Hewlett Packard Enterprise (HPE)

Dell Technologies Inc.

Microsoft Corporation

VMware Inc.

Oracle Corporation

Huawei Technologies Co. Ltd.

Red Hat Inc.

Juniper Networks Inc.

Citrix Systems Inc.

NEC Corporation

Fujitsu Limited

Broadcom Inc.

NetApp Inc.

#### Global Software-defined Anything (SDx) Market Report Scope:

Historical Data – 2023, 2024

Base Year for Estimation – 2024

Forecast period - 2025-2035

Report Coverage - Revenue forecast, Company Ranking, Competitive Landscape, Growth factors, and Trends

Regional Scope - North America; Europe; Asia Pacific; Latin America; Middle East & Africa

Customization Scope - Free report customization (equivalent to up to 8 analysts' working hours) with purchase. Addition or alteration to country, regional & segment scope\*

The objective of the study is to define market sizes of different segments & countries in

*Global Software-defined Anything (SDx) Market Size study & Forecast, by Type (Software Defined Infrastructure,...*

recent years and to forecast the values for the coming years. The report is designed to incorporate both qualitative and quantitative aspects of the industry within the countries involved in the study. The report also provides detailed information about crucial aspects, such as driving factors and challenges, which will define the future growth of the market. Additionally, it incorporates potential opportunities in micro-markets for stakeholders to invest, along with a detailed analysis of the competitive landscape and product offerings of key players. The detailed segments and sub-segments of the market are explained below:

#### Key Takeaways:

Market Estimates & Forecast for 10 years from 2025 to 2035.

Annualized revenues and regional-level analysis for each market segment.

Detailed analysis of the geographical landscape with country-level analysis of major regions.

Competitive landscape with information on major players in the market.

Analysis of key business strategies and recommendations on future market approach.

Analysis of the competitive structure of the market.

Demand side and supply side analysis of the market.

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