

Global Network Monitoring Hardware Market - Technologies, Bandwidths and Industry Sectors

<https://marketpublishers.com/r/G63A2F406B3DEN.html>

Date: August 2025

Pages: 468

Price: US\$ 5,490.00 (Single User License)

ID: G63A2F406B3DEN

Abstracts

Global Network Monitoring Hardware Market Trends and Outlook

The global network monitoring hardware market is on track to nearly double in size between 2025 and 2032, growing from US\$1.7 billion to approximately US\$3.2 billion at a CAGR of 9.8%. Growth is being driven by the accelerating adoption of ultra-high-speed networks, rapid 5G rollouts, multi-gigabit enterprise architectures, and increasing complexity from hybrid and multi-cloud environments. Across industries such as IT & Telecom, BFSI, healthcare, and manufacturing, organizations are prioritizing deterministic visibility and real-time packet capture to ensure performance, security, and compliance in the face of surging data volumes and evolving cyber threats.

Technological innovation is reshaping the market, with vendors introducing FPGA-accelerated probes, SmartNIC-powered capture systems, and time-synchronized recording appliances capable of processing terabits of traffic with nanosecond precision. The shift toward disaggregated, open monitoring fabrics is creating opportunities for specialized modular hardware, while integration with AI analytics platforms is enabling real-time anomaly detection and automated policy enforcement. Regionally, North America remains the largest market due to early adoption of 100G/400G packet brokers and strong compliance drivers, while Asia-Pacific is the fastest-growing region, led by telecom, hyperscale cloud expansion, and high-throughput data center deployments.

Leading vendors include APCON, Arista Networks, Cisco Systems, cPacket Networks, Endace, Garland Technology, Gigamon, Ixia (Keysight), Keysight Technologies, Napatech, NETSCOUT Systems, Plixer, Profitap, Riverbed Technology, Silicom, and Viavi Solutions, all competing on performance, integration, and ecosystem interoperability.

Network Monitoring Hardware Regional Market Analysis

North America will remain the largest regional market throughout the forecast period, accounting for the highest share in 2025 at 36.6%. Its leadership is driven by early and widespread adoption of 100G/400G packet broker infrastructure, strong investment from hyperscalers, and compliance with stringent regulatory frameworks like HIPAA, GLBA, and sector-specific mandates in finance and healthcare. Asia-Pacific is forecast to be the fastest-growing region, registering a CAGR of 12.7% to reach US\$1 billion by 2032. Growth is spurred by rapid network buildouts among telecom operators and cloud service providers in China, India, and Southeast Asia, alongside widespread 5G rollouts and the transition to high-density, ultra-fast data center fabrics.

Network Monitoring Hardware Market Analysis by Technology Type

Ethernet is the largest technology segment in 2025, supported by its widespread deployment in enterprise networks, compatibility with multi-gigabit architectures, and cost efficiency for core and edge monitoring applications. Fiber Optic technology holds the second-largest share, benefiting from high-speed backbone upgrades, long-distance data transmission needs, and increasing adoption in data center interconnects. InfiniBand will be the fastest-growing technology, registering an 11.3% CAGR. Its momentum is fueled by its ultra-low latency, high throughput, and suitability for high-performance computing (HPC), AI clusters, and advanced analytics workloads. The technology's growth is also reinforced by hyperscaler investments and the need for lossless packet delivery in environments running 400G and emerging 800G interconnects.

Network Monitoring Hardware Market Analysis by Bandwidth

The 1 & 10 Gbps category will remain the largest segment and projected to reach about US\$1.6 billion by 2032. Its dominance is supported by its entrenched role in enterprise LANs, campus networks, and branch deployments where cost-effective visibility remains a priority. The fastest-growing category will be 100 Gbps, advancing at a 12.9% CAGR. This segment is benefiting from hyperscaler deployments, HPC and AI workloads, and the growing need for packet brokers and capture appliances capable of handling ultra-high throughput without packet loss. The rising shift toward 400G and 800G backbone links in telecom and cloud environments will further accelerate demand for monitoring hardware optimized for 100 Gbps aggregation and traffic inspection, particularly in data center fabrics and regulated industries requiring deterministic

visibility.

Network Monitoring Hardware Market Analysis by Company Type

Large enterprises will continue to hold the largest share, accounting for 67.4%. Their dominance stems from expansive network infrastructures, multi-gigabit and hybrid cloud environments, and strict compliance obligations in sectors like finance, healthcare, and manufacturing, which demand advanced packet brokers, FPGA-accelerated capture systems, and high-density forensic recording appliances. SMEs, though smaller in absolute value, will be the fastest-growing segment, registering an 11.1% CAGR. Growth in this segment is driven by rising cyber threats, increased reliance on cloud and SaaS applications, and the availability of more affordable, plug-and-play monitoring appliances with simplified management interfaces. Vendors catering to SMEs are also benefiting from demand for compact, ruggedized probes and subscription-based hardware models, enabling smaller organizations to achieve enterprise-grade visibility without prohibitive capital costs.

Network Monitoring Hardware Market Analysis by Industry Sector

IT & Telecom is the largest sector, generating US\$590 million in 2025 and reaching about US\$1.2 billion by 2032. Its leadership is underpinned by rapid 5G deployments, hyperscale data center expansions, and the need for ultra-high-speed packet brokers and forensic capture appliances to support large-scale, low-latency networks. BFSI is the second-largest sector in 2025, supported by stringent compliance mandates such as PCI DSS 4.0 and GLBA, as well as the sector's reliance on real-time transaction monitoring and security visibility. The fastest-growing sector will be IT & Telecom, with a CAGR of 10.9%, driven by escalating bandwidth demands, the rollout of 400G/800G network backbones, and rising adoption of SmartNIC-enabled monitoring in carrier and enterprise environments.

Network Monitoring Hardware Market Report Scope

This global report on Network Monitoring Hardware market analyzes the global and regional market based on Technology Type, Bandwidth, Company Type and Industry Sector for the period 2022-2032 with forecasts from 2025 to 2032 in terms of value in US\$. In addition to providing profiles of major companies operating in this space, the latest corporate and industrial developments have been covered to offer a clear panorama of how and where the market is progressing.

Key Metrics

Analysis Period: 2022-2032

Base Year: 2025

Forecast Period: 2025-2032

Units: Value market in US\$

Companies Mentioned: 15+

Network Monitoring Hardware Market by Geographic Region

North America (The United States, Canada and Mexico)

Europe (Germany, the United Kingdom, France, Italy, the Netherlands, Spain, Russia, Switzerland and Rest of Europe)

Asia-Pacific (China, Japan, India, Australia, Singapore, South Korea and Rest of Asia-Pacific)

South America (Brazil, Argentina, Colombia, Chile, Peru and Rest of South America)

Middle East & Africa (the United Arab Emirates, South Africa, Egypt, Saudi Arabia, Morocco, Kuwait, Qatar and Rest of Middle East & Africa)

Network Monitoring Hardware Market by Technology Type

Ethernet

Fiber Optics

InfiniBand

Network Monitoring Hardware Market by Bandwidth

1&10 Gbps

40 Gbps

100 Gbps

Network Monitoring Hardware Market by Company Type

Large Enterprises

SMEs

Network Monitoring Hardware Market by Industry Sector

IT & Telecom

Banking, Financial Services, and Insurance (BFSI)

Government & Defense

Healthcare

Manufacturing

Energy & Utilities

Retail & E-commerce

Education

Media & Entertainment

Transportation & Logistics

Other Industry Sectors

Contents

PART A: GLOBAL MARKET PERSPECTIVE

1. EXECUTIVE SUMMARY

A Roundup on Network Monitoring Hardware
Market Segmentation for Network Monitoring Hardware
Technology Types
Bandwidths
Company Types
Industry Sectors
Key Trends in Network Monitoring Hardware Market

2. INDUSTRY LANDSCAPE

Global Network Monitoring Hardware Market Outlook
Comprehensive Network Monitoring Hardware Industry Analysis - Growth Drivers and Inhibitors
Growth Drivers
Growth Inhibitors
Market Entry Strategies for Network Monitoring Hardware Industry
Startup Strategies for Network Monitoring Hardware Industry
SWOT Analysis of Network Monitoring Hardware Industry
Strengths
Weaknesses
Opportunities
Threats
Porter's Five Forces Analysis
PESTEL Analysis

3. COMPETITIVE LANDSCAPE

Market Positioning of Key Network Monitoring Hardware Companies
Market Share Analysis of Network Monitoring Hardware Companies
SWOT Analysis of Key Players in the Network Monitoring Hardware Industry
Key Market Players
APCON
Arista Networks

Cisco Systems
cPacket Networks
Endace
Garland Technology
Gigamon
Ixia (Keysight)
Keysight Technologies
Napatech
NETSCOUT Systems
Plixer
Profitap
Riverbed Technology
Silicom
Viavi Solutions

4. KEY BUSINESS & PRODUCT TRENDS

5. GLOBAL MARKET OVERVIEW

Global Network Monitoring Hardware Market Overview by Technology Type
Network Monitoring Hardware Technology Type Market Overview by Global Region
Ethernet
Fiber Optics
InfiniBand
Global Network Monitoring Hardware Market Overview by Bandwidth
Network Monitoring Hardware Bandwidth Market Overview by Global Region
1&10 Gbps
40 Gbps
100 Gbps
Global Network Monitoring Hardware Market Overview by Company Type
Network Monitoring Hardware Company Type Market Overview by Global Region
Large Enterprises
SMEs
Global Network Monitoring Hardware Market Overview by Industry Sector
Network Monitoring Hardware Industry Sector Market Overview by Global Region
IT & Telecom
Banking, Financial Services, and Insurance (BFSI)
Government & Defense
Healthcare

Manufacturing
Energy & Utilities
Retail & E-commerce
Education
Media & Entertainment
Transportation & Logistics
Other Industry Sectors

PART B: REGIONAL MARKET PERSPECTIVE

Global Network Monitoring Hardware Market Overview by Geographic Region

REGIONAL MARKET OVERVIEW

6. NORTH AMERICA

North American Network Monitoring Hardware Market Overview by Geographic Region
North American Network Monitoring Hardware Market Overview by Technology Type
North American Network Monitoring Hardware Market Overview by Bandwidth
North American Network Monitoring Hardware Market Overview by Company Type
North American Network Monitoring Hardware Market Overview by Industry Sector
Country-wise Analysis of North American Network Monitoring Hardware Market

THE UNITED STATES

United States Network Monitoring Hardware Market Overview by Technology Type
United States Network Monitoring Hardware Market Overview by Bandwidth
United States Network Monitoring Hardware Market Overview by Company Type
United States Network Monitoring Hardware Market Overview by Industry Sector

CANADA

Canadian Network Monitoring Hardware Market Overview by Technology Type
Canadian Network Monitoring Hardware Market Overview by Bandwidth
Canadian Network Monitoring Hardware Market Overview by Company Type
Canadian Network Monitoring Hardware Market Overview by Industry Sector

MEXICO

Mexican Network Monitoring Hardware Market Overview by Technology Type
Mexican Network Monitoring Hardware Market Overview by Bandwidth
Mexican Network Monitoring Hardware Market Overview by Company Type
Mexican Network Monitoring Hardware Market Overview by Industry Sector

7. EUROPE

European Network Monitoring Hardware Market Overview by Geographic Region

European Network Monitoring Hardware Market Overview by Technology Type

European Network Monitoring Hardware Market Overview by Bandwidth

European Network Monitoring Hardware Market Overview by Company Type

European Network Monitoring Hardware Market Overview by Industry Sector

Country-wise Analysis of European Network Monitoring Hardware Market

GERMANY

German Network Monitoring Hardware Market Overview by Technology Type

German Network Monitoring Hardware Market Overview by Bandwidth

German Network Monitoring Hardware Market Overview by Company Type

German Network Monitoring Hardware Market Overview by Industry Sector

THE UNITED KINGDOM

United Kingdom Network Monitoring Hardware Market Overview by Technology Type

United Kingdom Network Monitoring Hardware Market Overview by Bandwidth

United Kingdom Network Monitoring Hardware Market Overview by Company Type

United Kingdom Network Monitoring Hardware Market Overview by Industry Sector

FRANCE

French Network Monitoring Hardware Market Overview by Technology Type

French Network Monitoring Hardware Market Overview by Bandwidth

French Network Monitoring Hardware Market Overview by Company Type

French Network Monitoring Hardware Market Overview by Industry Sector

ITALY

Italian Network Monitoring Hardware Market Overview by Technology Type

Italian Network Monitoring Hardware Market Overview by Bandwidth

Italian Network Monitoring Hardware Market Overview by Company Type

Italian Network Monitoring Hardware Market Overview by Industry Sector

THE NETHERLANDS

Dutch Network Monitoring Hardware Market Overview by Technology Type

Dutch Network Monitoring Hardware Market Overview by Bandwidth

Dutch Network Monitoring Hardware Market Overview by Company Type

Dutch Network Monitoring Hardware Market Overview by Industry Sector

SPAIN

Spanish Network Monitoring Hardware Market Overview by Technology Type

Spanish Network Monitoring Hardware Market Overview by Bandwidth

Spanish Network Monitoring Hardware Market Overview by Company Type

Spanish Network Monitoring Hardware Market Overview by Industry Sector

RUSSIA

Russian Network Monitoring Hardware Market Overview by Technology Type

Russian Network Monitoring Hardware Market Overview by Bandwidth
Russian Network Monitoring Hardware Market Overview by Company Type
Russian Network Monitoring Hardware Market Overview by Industry Sector

SWITZERLAND

Swiss Network Monitoring Hardware Market Overview by Technology Type
Swiss Network Monitoring Hardware Market Overview by Bandwidth
Swiss Network Monitoring Hardware Market Overview by Company Type
Swiss Network Monitoring Hardware Market Overview by Industry Sector

REST OF EUROPE

Rest of Europe Network Monitoring Hardware Market Overview by Technology Type
Rest of Europe Network Monitoring Hardware Market Overview by Bandwidth
Rest of Europe Network Monitoring Hardware Market Overview by Company Type
Rest of Europe Network Monitoring Hardware Market Overview by Industry Sector

8. ASIA-PACIFIC

Asia-Pacific Network Monitoring Hardware Market Overview by Geographic Region
Asia-Pacific Network Monitoring Hardware Market Overview by Technology Type
Asia-Pacific Network Monitoring Hardware Market Overview by Bandwidth
Asia-Pacific Network Monitoring Hardware Market Overview by Company Type
Asia-Pacific Network Monitoring Hardware Market Overview by Industry Sector
Country-wise Analysis of Asia-Pacific Network Monitoring Hardware Market

CHINA

Chinese Network Monitoring Hardware Market Overview by Technology Type
Chinese Network Monitoring Hardware Market Overview by Bandwidth
Chinese Network Monitoring Hardware Market Overview by Company Type
Chinese Network Monitoring Hardware Market Overview by Industry Sector

JAPAN

Japanese Network Monitoring Hardware Market Overview by Technology Type
Japanese Network Monitoring Hardware Market Overview by Bandwidth
Japanese Network Monitoring Hardware Market Overview by Company Type
Japanese Network Monitoring Hardware Market Overview by Industry Sector

INDIA

Indian Network Monitoring Hardware Market Overview by Technology Type
Indian Network Monitoring Hardware Market Overview by Bandwidth
Indian Network Monitoring Hardware Market Overview by Company Type
Indian Network Monitoring Hardware Market Overview by Industry Sector

AUSTRALIA

Australia Network Monitoring Hardware Market Overview by Technology Type

Australia Network Monitoring Hardware Market Overview by Bandwidth
Australia Network Monitoring Hardware Market Overview by Company Type
Australia Network Monitoring Hardware Market Overview by Industry Sector

SINGAPORE

Singaporean Network Monitoring Hardware Market Overview by Technology Type
Singaporean Network Monitoring Hardware Market Overview by Bandwidth
Singaporean Network Monitoring Hardware Market Overview by Company Type
Singaporean Network Monitoring Hardware Market Overview by Industry Sector

SOUTH KOREA

South Korean Network Monitoring Hardware Market Overview by Technology Type
South Korean Network Monitoring Hardware Market Overview by Bandwidth
South Korean Network Monitoring Hardware Market Overview by Company Type
South Korean Network Monitoring Hardware Market Overview by Industry Sector

REST OF ASIA-PACIFIC

Rest of Asia-Pacific Network Monitoring Hardware Market Overview by Technology Type

Rest of Asia-Pacific Network Monitoring Hardware Market Overview by Bandwidth
Rest of Asia-Pacific Network Monitoring Hardware Market Overview by Company

Type

Rest of Asia-Pacific Network Monitoring Hardware Market Overview by Industry Sector

9. SOUTH AMERICA

South American Network Monitoring Hardware Market Overview by Geographic Region
South American Network Monitoring Hardware Market Overview by Technology Type
South American Network Monitoring Hardware Market Overview by Bandwidth
South American Network Monitoring Hardware Market Overview by Company Type
South American Network Monitoring Hardware Market Overview by Industry Sector
Country-wise Analysis of South American Network Monitoring Hardware Market

BRAZIL

Brazilian Network Monitoring Hardware Market Overview by Technology Type
Brazilian Network Monitoring Hardware Market Overview by Bandwidth
Brazilian Network Monitoring Hardware Market Overview by Company Type
Brazilian Network Monitoring Hardware Market Overview by Industry Sector

ARGENTINA

Argentine Network Monitoring Hardware Market Overview by Technology Type
Argentine Network Monitoring Hardware Market Overview by Bandwidth
Argentine Network Monitoring Hardware Market Overview by Company Type

Argentine Network Monitoring Hardware Market Overview by Industry Sector
COLOMBIA

Colombian Network Monitoring Hardware Market Overview by Technology Type
Colombian Network Monitoring Hardware Market Overview by Bandwidth
Colombian Network Monitoring Hardware Market Overview by Company Type
Colombian Network Monitoring Hardware Market Overview by Industry Sector

CHILE

Chilean Network Monitoring Hardware Market Overview by Technology Type
Chilean Network Monitoring Hardware Market Overview by Bandwidth
Chilean Network Monitoring Hardware Market Overview by Company Type
Chilean Network Monitoring Hardware Market Overview by Industry Sector

PERU

Peruvian Network Monitoring Hardware Market Overview by Technology Type
Peruvian Network Monitoring Hardware Market Overview by Bandwidth
Peruvian Network Monitoring Hardware Market Overview by Company Type
Peruvian Network Monitoring Hardware Market Overview by Industry Sector

REST OF SOUTH AMERICA

Rest of South America Network Monitoring Hardware Market Overview by
Technology Type
Rest of South America Network Monitoring Hardware Market Overview by Bandwidth
Rest of South America Network Monitoring Hardware Market Overview by Company
Type
Rest of South America Network Monitoring Hardware Market Overview by Industry
Sector

10. MIDDLE EAST & AFRICA

Middle East & Africa Network Monitoring Hardware Market Overview by Geographic
Region

Middle East & Africa Network Monitoring Hardware Market Overview by Technology
Type

Middle East & Africa Network Monitoring Hardware Market Overview by Bandwidth

Middle East & Africa Network Monitoring Hardware Market Overview by Company Type

Middle East & Africa Network Monitoring Hardware Market Overview by Industry Sector

Country-wise Analysis of Middle East & Africa Network Monitoring Hardware Market

THE UNITED ARAB EMIRATES

United Arab Emirates Network Monitoring Hardware Market Overview by Technology
Type

United Arab Emirates Network Monitoring Hardware Market Overview by Bandwidth

United Arab Emirates Network Monitoring Hardware Market Overview by Company Type

United Arab Emirates Network Monitoring Hardware Market Overview by Industry Sector

SOUTH AFRICA

South African Network Monitoring Hardware Market Overview by Technology Type

South African Network Monitoring Hardware Market Overview by Bandwidth

South African Network Monitoring Hardware Market Overview by Company Type

South African Network Monitoring Hardware Market Overview by Industry Sector

EGYPT

Egyptian Network Monitoring Hardware Market Overview by Technology Type

Egyptian Network Monitoring Hardware Market Overview by Bandwidth

Egyptian Network Monitoring Hardware Market Overview by Company Type

Egyptian Network Monitoring Hardware Market Overview by Industry Sector

SAUDI ARABIA

Saudi Arabian Network Monitoring Hardware Market Overview by Technology Type

Saudi Arabian Network Monitoring Hardware Market Overview by Bandwidth

Saudi Arabian Network Monitoring Hardware Market Overview by Company Type

Saudi Arabian Network Monitoring Hardware Market Overview by Industry Sector

MOROCCO

Moroccan Network Monitoring Hardware Market Overview by Technology Type

Moroccan Network Monitoring Hardware Market Overview by Bandwidth

Moroccan Network Monitoring Hardware Market Overview by Company Type

Moroccan Network Monitoring Hardware Market Overview by Industry Sector

KUWAIT

Kuwaiti Network Monitoring Hardware Market Overview by Technology Type

Kuwaiti Network Monitoring Hardware Market Overview by Bandwidth

Kuwaiti Network Monitoring Hardware Market Overview by Company Type

Kuwaiti Network Monitoring Hardware Market Overview by Industry Sector

QATAR

Qatari Network Monitoring Hardware Market Overview by Technology Type

Qatari Network Monitoring Hardware Market Overview by Bandwidth

Qatari Network Monitoring Hardware Market Overview by Company Type

Qatari Network Monitoring Hardware Market Overview by Industry Sector

REST OF MIDDLE EAST & AFRICA

Rest of Middle East & Africa Network Monitoring Hardware Market Overview by Technology Type

Rest of Middle East & Africa Network Monitoring Hardware Market Overview by Bandwidth

Rest of Middle East & Africa Network Monitoring Hardware Market Overview by
Company Type

Rest of Middle East & Africa Network Monitoring Hardware Market Overview by
Industry Sector

PART C: INDUSTRY GUIDE

PART D: ANNEXURE

RESEARCH METHODOLOGY

FEEDBACK

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