

WAN Optimization Market by Component (Solution (Traditional WAN and SD-WAN) and Services (Professional and Managed)), Deployment Type (Cloud and On-premises), Vertical, End User (Large Enterprises and SMEs), and Region - Global Forecast to 2025

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Abstracts

Rising need to ensure the quality of user experience and productivity to drive the market growth

Most cloud-based applications need good bandwidth and low latency for effective utilization. In large-scale WAN deployments, latency, bandwidth constraints, and packet losses are inevitable. WAN optimization enables enterprises and service providers to save money and reduce costs with reduced bandwidth requirements and increased user efficiency by alleviating the effects of latency and distance between branch offices, data centers, and cloud. Customer experience is a critical and important factor in this application era. Employee productivity and customer satisfaction are not realized when applications fail to perform properly. The digital transformation fails to produce the desired business impact, unless application performance is protected and delivered optimally to all users. The important challenge of IT teams of every organization is to dynamically orchestrate the performance and user experience of every application in real-time, irrespective of the size, location, and complexity of network environments, which can be solved with the help of WAN optimization solutions.

The WAN optimization market size is projected to grow from USD 1.0 billion in 2020 to USD 1.4 billion by 2025, at a Compound Annual Growth Rate (CAGR) of 6.7% during the forecast period. The major factors driving the growth of the WAN optimization

market are the rising number of data centers and branch offices, and increasing cloud-based WAN optimization solutions.

The banking, financial services, and insurance vertical to hold the highest market share during the forecast period

Based on verticals, the Banking, Financial Services, and Insurance (BFSI) segment of the WAN optimization market is projected to hold the highest market share during the forecast period. The BFSI vertical is adopting innovative technologies, primarily due to changes in the centralized and computerized process in this vertical. The vertical includes commercial banks, non-banking financial organizations, and insurance companies. It is witnessing the rapid growth of new technologies related to financial security and data due to the confidential nature of the data that needs to be always secured. Online banking, mobile banking, and electronic payments are growing at a rapid pace as banks evolve from a traditional payment processing and enquiry-based business to digital banking. The volume, geographical reach, and accessibility of retail environments are vital. The quick adoption of WAN optimization is expected in the financial services vertical due to the need to connect all the remote branches of companies to a core banking system, which is not possible without Application Delivery Controller (ADC). With the introduction of WAN optimization-as-a-service, financial services institutions are able to do cost-savings as the services get billed on the basis of their usage. Financial firms do not have to invest in new hardware and software. The flexibility of cloud-based operating models also enables financial institutions to experience shorter development cycles for new products.

The large enterprises segment to record a higher market share in 2020

Large enterprises are organizations with the employee strength of more than 1,000 employees and annual revenue higher than USD one billion. These organizations need the expertise of IT staff to manage specific applications and IT infrastructure due to the large amount of data they generate. They always focus on the adoption of those industry solutions that can help them in increasing their operational efficiency. WAN optimization solutions help large enterprises motivate and encourage employees by offering enhanced user experience. They also assist large enterprises in increasing client base with the help of innovative and exciting gamified techniques. Enterprises are expected to continue to adopt on-premises and cloud-based WAN optimization solutions at a faster pace.

The cloud segment to hold a higher market share during the forecast period

The cloud deployment model is gaining traction in the market due to its several advantages, such as cost-savings for additional hardware and software, and scalability, over the on-premises deployment model. In the cloud deployment method, vendors such as Aryaka Networks offers WAN optimization as a cloud-based service. One of the other important advantages of WAN optimization-as-a-service is that enterprises can customize solutions according to their requirements, whenever new applications are installed. This cloud-based service provides benefits, such as reduced licensing costs, ability to cut out unnecessary Information Technology (IT) staff, focus on maintenance, and flexibility in expansion of businesses. However, for cloud deployment enterprises need to analyze the benefits of their existing set up as well as those that a cloud-based service can give them.

North America to record the highest market share in 2020

The North American region is a receptive market toward the adoption of WAN optimization solutions. The region is witnessing huge demands for SD-WAN solutions due to the rising demand for the next-generation 5G network. Enterprises in the region are shifting to managed SD-WAN services due to the rapidly changing technological landscape. Telecom providers in North America are providing services for both accelerating and monitoring application performance by integrating different toolsets. Major North American WAN optimization vendors are developing new technologies, which are making the WAN optimization process much efficient and cost-effective. North America mainly consists of the US and Canada. In terms of market size, the US is expected to hold a larger market size in the region. The US is witnessing heavy investments in the broadband infrastructure in the country and is contributing to the growth of the WAN optimization market in the region.

In-depth interviews were conducted with Chief Executive Officers (CEOs), marketing directors, innovation and technology directors, and executives from various key organizations operating in the WAN optimization market.

By Company Type: Tier 1 – 60%, Tier 2 – 25%, and Tier 3 – 15%

By Designation: C-level – 48%, Directors – 28%, and Others – 24%

By Region: North America – 35%, Europe – 28%, APAC – 23%, and RoW– 14%

The key market players profiled in this report include Cisco (US), Riverbed (US), Citrix (US), Infovista (UK), Silver Peak (US), Array Networks (US), Aryaka (US), Circadence (US), Fat Pipe (US), Nuage Networks(US), Oracle (US), Huawei(China), Wanos (South Africa), Equinix (US), Exinda (US), F5 (US), Aruba (US), and VMware(US). These players have adopted various growth strategies, including partnerships and new service launches, to expand their presence in the WAN optimization market and increase their customer base.

Research coverage

The market study covers the WAN optimization market across different segments. It aims at estimating the market size and the growth potential of this market across components (solutions and services), solutions, services , deployment modes, end user types, verticals, and regions. The study also includes an in-depth competitive analysis of the key market players, along with their company profiles, key observations related to product and business offerings, recent developments, and key market strategies.

Key benefits of buying the report

The report is expected to help the market leaders/new entrants in this market by providing them with information on the closest approximations of the revenue numbers for the overall WAN optimization market and its segments. This report is also expected to help stakeholders understand the competitive landscape and gain insights to improve the position of their business and plan suitable go-to-market strategies. It also aims at helping stakeholders understand the pulse of the market and providing them with information on key market drivers, restraints, challenges, and opportunities.

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