

Content Delivery Network (CDN) - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts (2024 - 2029)

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Abstracts

The Content Delivery Network Market size is estimated at USD 23.79 billion in 2024, and is expected to reach USD 40.56 billion by 2029, growing at a CAGR of 11.26% during the forecast period (2024-2029).

The growing number of internet users and the tendency of users to play games on mobile devices, with storage issues in many devices, is one of the major drivers for the market. A significant advantage of cloud-based gaming is that games are available anytime from almost any device, such as smartphones and tablets. Also, a content delivery network(CDN) is a promising paradigm for gaming delivery, as users can play games on any OS or device.

Key Highlights

The popularity of online gaming is increasing along with the introduction of new technology like 4K and Ultra HD. While these new technologies make gaming more enjoyable, they can negatively impact the pre-gaming experience by making players wait hours for the download to finish. Gamers may respond negatively to this on open platforms, which could cost the providers money.

Moreover, gamers may be discouraged, and gaming companies may be unable to reach a wider audience due to long wait times for downloads of games. Therefore, to avoid any lag in performance, companies are investing in CDNs to deliver high-quality content globally for CDN solutions. The increasing internet speed supported by the emergence of low-cost data-based telecom services is fueling the adoption of cloud gaming platforms, which is driving the subscription of video streaming-based cloud

gaming, increasing the market growth in the future.

With the growing smartphone adoption, as indicated in the graph, the demand for original, high-quality content and the ongoing growth of content consumption have made effective CDN solutions necessary to boost content delivery and network performance. The market is anticipated to develop faster throughout the forecast period due to the increased demand for Over-the-Top (OTT) and Video-on-Demand (VOD) services, guaranteeing continuous content delivery over a high-speed data network.

Some of the most influential organizations are moving away from third-party CDN services and towards deploying a content delivery network tailored to their needs. As more people use video streaming services to watch movies and advertise, viruses and cyber-attacks are rising. The lack of appropriate standards and procedures for discovering and regulating video content could hinder market expansion.

Furthermore, e-commerce was previously tapping customers away from brick-and-mortar stores all over the region when the pandemic struck, but COVID-19 gave consumers a mighty shove into the arms of e-commerce.

Content Delivery Network (CDN) Market Trends

Media and Entertainment (M&E) segment to Witness Major Growth

The media and entertainment segment would contribute significantly to the market growth during the forecast period, supported by the demand for high-quality online content broadcasting among the media players and the development of OTT platforms worldwide, increasing the demand for CDN solutions. According to Netflix, Netflix had around 260 million paid subscribers worldwide as of the fourth quarter of 2023.

The content delivery network demand in the media and entertainment sector is characterized by the growing demand for streaming and rich media services, the proliferation of online gaming, and the ever-increasing demand for efficiency, reliability, and quality in video streaming and content delivery. Further, the ever-evolving online gaming industry necessitates enhanced user experience, seamless game performance, and reduced latency, thus further offering lucrative growth opportunities for the CDN market.

Moreover, Media and entertainment (M&E) companies face significant pressure to continuously deliver high-quality content and experiences that attract and retain

viewers. This further drives the demand for CDN solutions and services in the media and entertainment sector to scale live events and streaming channels and secure content, websites, and applications from attacks.

In the fast-paced digital landscape, the efficiency and speed of content delivery networks are crucial for distributing video content globally. Market vendors are recognizing the need and entering into partnerships with streaming companies for advanced video streaming services.

As increasing numbers of users demand online content, the demand for content delivery network solutions and services in the media and entertainment companies is expected to grow to deliver top-tier content consistently and reliably to large audiences. Moreover, in the coming years, video streaming and Real-time Voice over Internet Protocol (VoIP) are anticipated to become increasingly popular in gaming. CDNs are well-positioned to facilitate these trends by delivering low-latency, high-quality streaming experiences.

Asia-Pacific to Register Significant Growth

There has been a mounting demand for CDNs in China, reflecting the country's growing digital economy, expanding online population, and increasing digital content consumption across various industries.

Moreover, China is among the fastest-growing e-commerce markets globally. With millions of online shoppers and a growing digital economy, businesses rely on CDNs to ensure fast and reliable delivery of digital content to users across the country, including product images, videos, and web pages. CDNs help e-commerce platforms optimize website performance, reduce latency, and enhance the overall user experience, increasing customer satisfaction and higher conversion rates. Hence, most e-commerce companies are adopting content delivery networks, which has led to a growing demand for CDNs in China.

Furthermore, OTT platforms like Netflix, Amazon Prime Video, and Hulu are witnessing rapid adoption in Japan. These platforms offer a wide range of video content, including movies, TV shows, and original series, which require reliable and scalable content delivery infrastructure. CDNs enable OTT providers to deliver streaming video content to viewers across Japan with minimal latency and buffering, even during peak traffic.

In addition, the media and entertainment companies give the solutions designed for the content delivery network the highest precedence, in addition to end users in Japan, to meet shifting digital expectations and continue to be competitive. Moreover, to reinforce the country's technology infrastructure, the Government of Japan is aggressively supporting the digital revolution in the media and entertainment segment.

Content Delivery Network (CDN) Industry Overview

The content delivery network (CDN) security market is highly fragmented, with the presence of major players like Amazon Web Services Inc. (Amazon.com Inc.), Akamai Technologies Inc., Google LLC (Alphabet Inc.), Cloudflare Inc., and Edgio Inc. Players in the market are adopting strategies such as partnerships, mergers, investments, and acquisitions to enhance their product offerings and gain sustainable competitive advantage.

In December 2023, Romexsoft officially became an Amazon CloudFront Service Delivery partner to provide the AWS company's networking and content delivery services (CDN), which shows the company's growth strategy in line with developing partnership and delivery network channels in the market.

In October 2023, the Akamai Partner Program, GlobalLogic, announced designing and building innovative products, platforms, and digital experiences for customers worldwide, leveraging Akamai's cloud computing services, security, and content delivery network (CDN). GlobalLogic would collaborate with Akamai to offer global system integration, managed services, and professional services to mutual customers, increasing the market growth of the company's CDN portfolio.

Additional Benefits:

The market estimate (ME) sheet in Excel format

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