



SD-WAN Infrastructure Market Poised to Reach \$5.25 Billion in 2023, According to New IDC Forecast

SD-WAN Infrastructure Market Share Leaders include Cisco, VMware, Silver Peak, Nokia-Nuage

FRAMINGHAM, Mass., July 24, 2019 – International Data Corporation ([IDC](#)) has published two new research reports on the fast-growing Software Defined Wide Area Network (SD-WAN) infrastructure market. This important segment of the enterprise networking market will grow at a 30.8% compound annual growth rate (CAGR) from 2018 to 2023 to reach \$5.25 billion, according to IDC's SD-WAN Infrastructure Forecast. The IDC Market Shares report includes 2017 and 2018 revenues by vendor for SD-WAN infrastructure.

"SD-WAN continues to be one of the fastest-growing segments of the network infrastructure market, driven by a variety of factors. First, traditional enterprise WANs are increasingly not meeting the needs of today's modern digital businesses, especially as it relates to supporting SaaS apps and multi- and hybrid-cloud usage. Second, enterprises are interested in easier management of multiple connection types across their WAN to improve application performance and end-user experience," said [Rohit Mehra](#), vice president, [Network Infrastructure](#). "Combined with the rapid embrace of SD-WAN by leading communications service providers globally, these trends continue to drive deployments of SD-WAN, providing enterprises with dynamic management of hybrid WAN connections and the ability to guarantee high levels of quality of service on a per-application basis."

The SD-WAN infrastructure market continues to be highly competitive with sales increasing 64.9% in 2018 to \$1.37 billion. Incumbent networking vendors have leveraged their technological strengths and installed bases in routing and WAN optimization sales to lead the market, while numerous start-ups remain active. IDC finds that Cisco holds the largest share of the SD-WAN infrastructure market, fueled by its extensive routing portfolio that is used in SD-WAN deployments, as well as its Meraki portfolio and its SD-WAN management platform powered by technology it acquired from Viptela in August 2017. VMware, with its SD-WAN service powered by VeloCloud (which VMware acquired in December 2017), holds the second largest market share in the SD-WAN infrastructure market, followed by Silver Peak, Nokia-Nuage, and Riverbed.

IDC's Market Share and Market Forecast reports focus specifically on the SD-WAN infrastructure market, which includes both hardware and software used in SD-WAN deployments. IDC defines SD-WAN as a dynamic, policy-enabled hybrid WAN that uses at least two or more connection methods (such as MPLS, broadband internet, 3G/4G, etc.) and includes a centralized application-based policy controller that provides intelligent path selection, along with an optional forwarder for routing capability. The SD-WAN infrastructure Market Share and Forecast reports do not include managed services related to SD-WAN, such as setup or operational support, nor do they include connectivity costs.

The IDC SD-WAN Infrastructure Forecast provides an outlook for this market across major regions for the period extending to 2023, including historical numbers through 2017 and forecast numbers from 2019 to 2023. It also provides regional geographic segmentation of the SD-WAN infrastructure market, including market sizes and CAGRs for each major region (North America, EMEA, APJ, Latin America).

About IDC

International Data Corporation (IDC) is the premier global provider of market intelligence, advisory services, and events for the information technology, telecommunications, and consumer technology markets. With more than 1,100 analysts worldwide, IDC offers global, regional, and local expertise on technology and industry opportunities and trends in over 110 countries. IDC's analysis and insight helps IT professionals, business executives, and the investment community to make fact-based technology decisions and to achieve their key business objectives. Founded in 1964, IDC is a wholly-owned subsidiary of International Data Group (IDG), the world's leading media, data and marketing services company. To learn more about IDC, please visit www.idc.com. Follow IDC on Twitter at [@IDC](https://twitter.com/IDC) and [LinkedIn](https://www.linkedin.com/company/idc).

All product and company names may be trademarks or registered trademarks of their respective holders.

About IDC

IDC is the premier global provider of market intelligence, advisory services, and events for the information technology and telecommunications industries. IDC helps IT professionals, business executives, and the investment community make fact-based decisions on technology purchases and business strategy. Over 775 IDC analysts in 50 countries provide global, regional, and local expertise on technology and industry opportunities and trends. For more than 40 years, IDC has provided strategic insights to help our clients achieve their key business objectives. IDC is a subsidiary of IDG, the world's leading technology media, research, and events company. You can learn more about IDC by visiting <http://www.idc.com/>.

IDC is a subsidiary of IDG, the world's leading technology media, research, and events company. Additional information can be found at www.idc.com.

All product and company names may be trademarks or registered trademarks of their respective holders.

For more information contact:

Brandon Butler
bbutler@idc.com
508-935-4325
Rohit Mehra
rmehra@idc.com
416-616-4343
Michael Shirer
press@idc.com
508-935-4200