



## **Worldwide Enterprise WLAN Market Declines Slightly in the Third Quarter of 2019, According to IDC**

### ***Enterprise WLAN Market Revenue Fell 1.1% Year Over Year in 3Q19***

**FRAMINGHAM, Mass., December 5, 2019** – The combined enterprise and consumer wireless local area network (WLAN) market segments fell 3.6% year over year in the third quarter of 2019 (3Q19) with worldwide revenues of \$3.8 billion. According to results published in the International Data Corporation ([IDC](#)) [Worldwide Quarterly WLAN Tracker](#), the enterprise segment fell 1.1% year over year in 3Q19 to \$1.62 billion. The market is in a state of transition as a new wireless standard comes to market, but the continued demand for wireless access technologies, combined with new advanced software management and automation capabilities are expected to drive growth in this market moving forward.

The entrance of the 802.11ax wireless standard, also known as Wi-Fi 6, in the market took some share from shipments of previous generation 802.11ac products. 802.11ac products accounted for 84.8% of dependent access point shipments in the enterprise segment and 86.2% of dependent access point revenues. 802.11ax products made up 3.1% of dependent access point shipments and 6.1% of revenues.

Meanwhile, the consumer WLAN market fell 5.3% year over year to \$2.18 billion. Shipments of 802.11ac products accounted for 57.0% of units shipped, and 78.1% of revenues. The previous-generation 802.11n standard accounted for 42.8% of shipments, but only 20.8% of revenues.

"The enterprise WLAN market is transitioning as vendors and customers begin to adopt the latest Wi-Fi standard. In the third quarter of 2019, IDC tracked the initial shipments of 802.11ax, also known as Wi-Fi 6, which includes numerous features for enterprises and Internet of Things use cases," said [Brandon Butler](#), senior research analyst, [Enterprise Networks](#). "IDC expects the continued adoption of Wi-Fi 6 to be a major driver of growth for the enterprise WLAN market in the fourth quarter of 2019 and throughout 2020."

Results in the enterprise WLAN market were mixed across the globe. The Asia/Pacific region, excluding Japan, was up 3.3% annually in 3Q19, with China growing 6.9% year over year while the Korean market fell 16.2%. Japan's market dropped 19.8% compared to a year earlier.

Growth slowed across Europe in the third quarter. The Central and Eastern Europe region was off 1.7% compared to a year earlier, with Russia dropping 6.6%. Romania was a bright spot in the

region with 11.9% growth. The Western Europe region fell 4.5% year over year. Germany fell 3.5% while the United Kingdom was down 10.0%. The Middle East and Africa region grew 8.0% year over year with growth of 6.7% from the United Arab Emirates and 25.5% from Qatar.

The Latin America region fell 12.1% with Mexico off 17.3% year over year. The U.S. market rose 0.1% on an annualized basis and was up 0.5% sequentially from the second quarter of 2019.

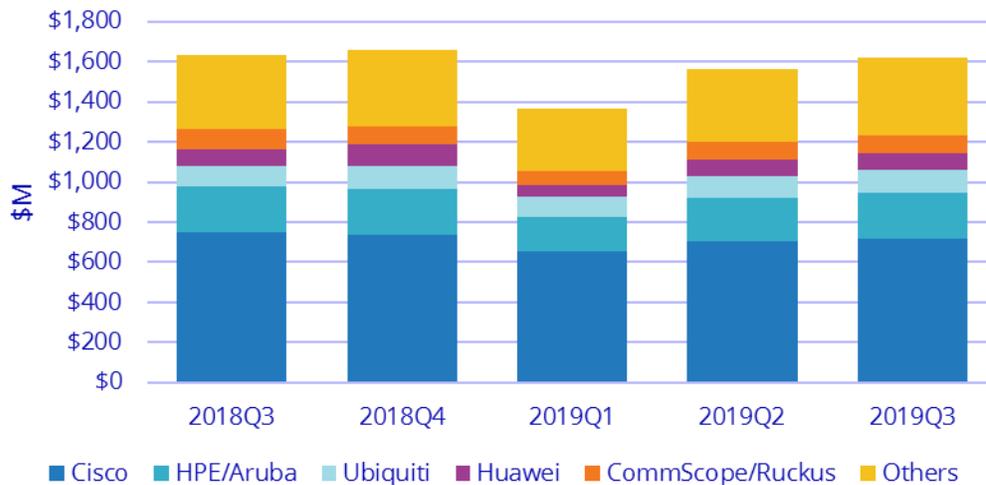
"The enterprise WLAN market saw mixed results regionally, in part influenced by macro-economic conditions that continue to disrupt the broader information technology sector," said [Petr Jirovsky](#), research manager, [Worldwide Networking Trackers](#). "Most notable has been the continued trade standoffs between the United States and China, along with the unresolved Brexit situation and political unrest in Latin America. These macro-economic and political situations create uncertainty for global businesses, which can in turn lead to pausing or scaling back of investments."

### ***Key Enterprise WLAN Company Highlights***

- **Cisco's** worldwide enterprise WLAN revenue fell 4.9% year over year, but grew 1.9% compared to the previous quarter. The company's market share dropped slightly from 44.9% in 2Q19 to 44.2% in 3Q19.
- **HPE-Aruba's** revenues increased 1.3% year over year and rose 4.6% sequentially. The company's market share grew to 14.1% in 3Q19 from 14.0% a quarter earlier.
- **Ubiquiti's** revenues rose 9.4% annually and 8.6% sequentially, with the company's market share growing to 7.1%, from 6.8% a quarter earlier.
- **Huawei's** quarterly revenues rose to 11.2% year over year and were up 3.7% sequentially, giving the company 5.4% market share.
- **CommScope** (formerly ARRIS/Ruckus) was off 20.3% year over year and was down 6.7% compared to 2Q19. That caused the company's market share to drop from 5.8% in the second quarter to 5.2% in 3Q19.

Figure 1

### Worldwide Top 5 Enterprise WLAN Companies, 2018Q3 - 2019Q3 Revenue (\$M)



Source: IDC 2019

The [IDC Quarterly WLAN Tracker](#) provides total market size and vendor share data in an easy-to-use Excel Pivot Table format. The geographic coverage includes eight major regions (USA, Canada, Latin America, Asia/Pacific (excluding Japan), Japan, Western Europe, Central and Eastern Europe, Middle East and Africa) and 58 countries. The WLAN market is further segmented by product class, product type, product, standard, and location. Measurement for the WLAN market is provided in factory revenue, customer revenue, and unit shipments.

For more information about IDC Quarterly WLAN Tracker, please contact Kathy Nagamine ([knagamine@idc.com](mailto:knagamine@idc.com)).

#### About IDC Trackers

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