Enterprise WLAN market grew 11.9% year over year in 3Q21

NEEDHAM, Mass., December 7, 2021 – Growth rates remained strong in the enterprise segment of the wireless local area networking (WLAN) market in the third quarter of 2021 (3Q21) as the market increased 11.9% year over year to $1.9 billion. In the consumer-class WLAN market, revenues declined 7.3% in the quarter to $2.4 billion. The combined enterprise and consumer WLAN markets grew revenues 0.4% year over year in 3Q21, according to the International Data Corporation (IDC) Worldwide Quarterly Wireless LAN Tracker.

The 11.9% growth in the enterprise-class segment builds on a strong first half of the year when the market increased 23.5% compared to first two quarters of 2020. Compared to the third quarter of 2019 – before the global COVID-19 pandemic – 3Q21 revenues increased 20.1%, indicating that demand in the enterprise WLAN is organically strong, outside of year-over-year comparisons to challenging markets for the industry in the height of the pandemic.

Growth in the enterprise WLAN market continues to be driven by the latest Wi-Fi standard, known as Wi-Fi 6 or 802.11ax. Wi-Fi 6 access points (AP) made up 62.2% of the revenues in the Dependent AP segment and accounted for 50.7% of unit shipments within the segment in 3Q21. Wi-Fi 5 products, also known as 802.11ac, made up the vast balance of remaining Dependent AP sales.

Meanwhile, the consumer-class WLAN market declined 7.3% year over year in 3Q21. During the COVID-19 pandemic in 2020, the segment had robust growth due to consumers upgrading their wireless connectivity. Compared to the second quarter of 2019 (before the pandemic), the market
grew 6.2%, indicating that fundamentals of the market remain strong. Wi-Fi 6 products continued to grow in the consumer market, rising to make up 27.9% of the consumer segment's total revenue, up from 24.5% in 2Q21. Wi-Fi 5 APs still account for the majority of revenues (61.4%) and unit shipments (63.6%).

"Enterprise WLAN is a dynamic market that continued to grow through the first three quarters of the year. A key driver for the enterprise WLAN sales is Wi-Fi 6, which once again fueled uptake in the market," said Brandon Butler, research manager, Network Infrastructure, IDC. "The enterprise WLAN market faces challenges though as the COVID-19 pandemic continues to sow uncertainty and supply chain issues are impacting markets across the ICT sector."

From a geographic perspective, the enterprise WLAN market saw growth across most regions of the world. Growth was particularly strong in Asia/Pacific where the market in China grew 37.8% year over year. Across the broader Asia/Pacific region (excluding Japan and China), growth was 12.7% year over year with Australia recording a 24.9% annual increase while Japan's market declined 21.3% year over year.

In the Americas, growth was mixed. The U.S. market increased 3.8% year over year in 3Q21 and
compared to the third quarter of 2019, the market was up 18.0%. The Latin America region increased 63.7% year over year in 3Q21 with Mexico's market increasing 177.0%. Canada's market declined 1.0%.

The Western Europe market increased 16.2% year over year with strength from Germany's market, which grew 28.8%. Central and Eastern Europe increased 11.7% while the Middle East and Africa region was up 1.7% year over year.

"WLAN remains a key technology, fueling enterprise wireless-first network transformation journeys," noted Petr Jirovsky, research director, Worldwide Networking Trackers. "This enabled enterprise WLAN market growth to be relatively strong across all regions of the world in the third quarter of 2021."

Key Enterprise WLAN Vendor Updates:

Cisco saw its enterprise WLAN revenues increase 7.7% year over year in 3Q21. Cisco is the market share leader with 41.5% share, up from 38.3% share in 2Q21.

HPE-Aruba revenues rose 5.0% year over year in 3Q21. The company’s market share was 11.8%, down slightly from 12.2% in the previous quarter.
Ubiquiti enterprise WLAN revenues increased 6.5% year over year in 3Q21, giving the company 8.2% market share.

Huawei enterprise WLAN revenues rose 36.6% year over year in 3Q21, giving the company 7.8% market share.

H3C revenues increased 56.3% in 3Q21, giving the company 5.8% market share, up from 4.8% in the previous quarter.

The IDC Worldwide Quarterly WLAN Tracker provides total market size and vendor share data in an easy-to-use Excel pivot table format. The geographic coverage includes nine major regions (USA, Canada, Latin America, Asia/Pacific (excluding Japan and China), Japan, People's Republic of China, Western Europe, Central and Eastern
Europe, and the 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.

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