



## **Worldwide Enterprise WLAN Market Sees Strong Growth in Third Quarter of 2018, According to IDC**

### ***Enterprise WLAN Market Grew 9.8% Year Over Year in 3Q18***

**FRAMINGHAM, Mass., December 10, 2018** – The combined enterprise and consumer wireless local area network (WLAN) market segments rose 6.9% year over year in the third quarter of 2018 (3Q18) with worldwide revenues of \$2.7 billion. According to results published in the International Data Corporation (IDC) [Worldwide Quarterly WLAN Tracker](#), the enterprise segment rose 9.8% year over year in 3Q18 to \$1.6 billion. Sustained high demand for wireless access technologies combined with new advanced software management and automation capabilities continue to drive growth in this market.

The 802.11ac standard now accounts for 87.0% of dependent access point unit shipments in the enterprise segment and 94.6% of dependent access point revenues, marking this standard's full penetration into the market. Beginning early in 2019 the market will begin to shift toward adoption of the new 802.11ax standard, with operators of large public venues and other dense WiFi environments being the earliest adopters.

Meanwhile, the consumer WLAN market rose 2.8% year over year to \$1.1 billion. For the first time, 802.11ac shipments accounted for more than half of the market's volume, rising to 52.5% of units shipped and 75.5% of revenues. The previous-generation 802.11n standard accounted for 47.5% of shipments, but only 24.5% of revenues.

"After annualized growth of less than 2% in each of the first two quarters of 2018, the enterprise WLAN market rebounded in the third quarter with healthy growth," said [Brandon Butler](#), senior research analyst, [Network Infrastructure](#) at IDC. "The market is being driven by continued high demand for wireless access technologies and increased interest in advanced software platforms for controlling WLAN environments. Wireless access technology continues to be relied on for business-critical applications around the globe and the coming 802.11ax standard will help drive growth in this market in 2019 and beyond."

From a geographic perspective, the enterprise WLAN market in 3Q18 saw healthy growth in the Asia/Pacific (excluding Japan) (APeJ) region, which rose 5.4% year over year. Indonesia was a standout in the region, growing 56.3% year over year, while the region's largest market, the

People's Republic of China (PRC) was up 3.7%. Growth in the Philippines was up 26.7% year over year. Japan, meanwhile, grew 21.7%.

The Central and Eastern Europe region grew 20.3% year over year. Poland's market was up 42.3% year over year, while Russia's market grew 14.4%. The Western Europe region, meanwhile grew 7.9% year over year, and was up 6.3% sequentially. Standouts in the region included Ireland up 45.9% and France up 11.6%, which were offset by a 3.0% decline in the region's largest economy in Germany. Middle East and Africa grew 18.1% year over year. The United Arab Emirates grew 23.3% while Israel's market was up 36.0%.

The Latin America region was up 17.1% compared to a year earlier. Mexico's growth stood out, rising 19.0% compared to a year earlier, while Colombia's market was up 38.9%. The North America market rose 10.0% year over year and was up 4.3% over the second quarter of 2018.

"The third quarter of 2018 saw strong growth across most regions of the world, led by many of the world's mature markets, including in the U.S.," said [Petr Jirovsky](#), research manager, [Worldwide Networking Trackers](#). "Some emerging economies showed particular strength, such as in Latin America, as organizations across the globe continue to invest in access technology to help power their businesses through digital transformation efforts."

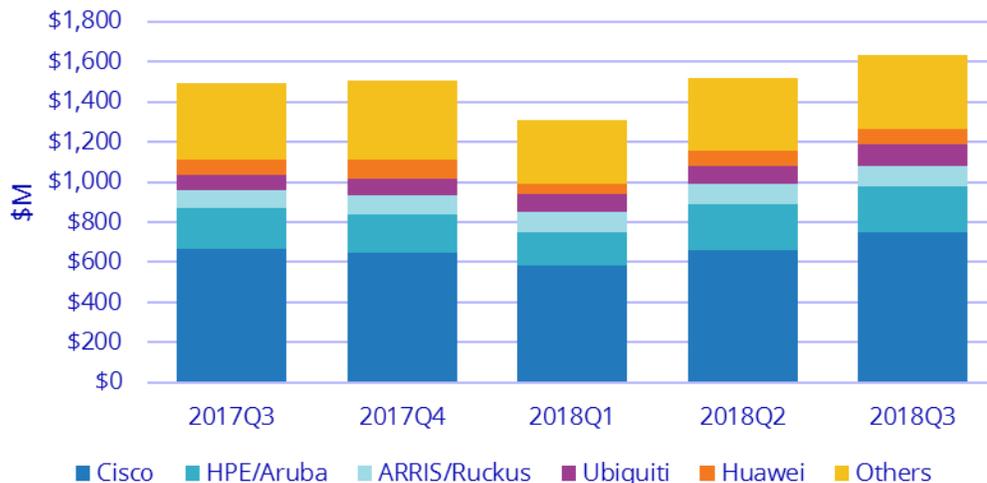
#### ***Key Enterprise WLAN Company Highlights***

- **Cisco's** worldwide enterprise WLAN revenue increased 12.8% year over year and it grew 13.8% quarter over quarter, marking a strong quarter for the company. That helped the company increase its market share to 46.0%, up from 44.7% in the same quarter of 2017.
- **Aruba-HPE's** revenues increased 10.7% year over year but were down 1.1% sequentially, giving the company a 13.8% market share.
- **ARRIS/Ruckus** continued to perform well with growth of 19.9% year over year and 3.8% sequentially. The company's market share grew from 5.9% in 3Q17 to 6.4% in the most recent quarter. During the fourth quarter of 2018 a preliminary deal for CommScope to purchase ARRIS, and in turn Ruckus, was announced, but it has not yet been finalized.
- **Ubiquiti** continued the company's strong growth with revenues increasing 32.4% year over year and 21.5% quarter over quarter. That helped propel the company's market share to 6.4%, up from 5.3% a year earlier.
- **Huawei** showed some moderation with growth of 4.6% year over year but just 0.9% sequentially. The company's market share dropped from 5.0% in 3Q17 to 4.8% a year later.

Figure 1



### Worldwide Top 5 Enterprise WLAN Companies, 2017Q3 - 2018Q3 Revenue (\$M)



Source: IDC 2018

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

[IDC Tracker](#) products provide accurate and timely market size, vendor share, and forecasts for hundreds of technology markets from more than 100 countries around the globe. Using proprietary tools and research processes, IDC's Trackers are updated on a semiannual, quarterly, and monthly basis. Tracker results are delivered to clients in user-friendly excel deliverables and on-line query tools.

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