



Worldwide Enterprise WLAN Market Continues Moderate Growth in the First Quarter of 2019, According to IDC

Enterprise WLAN Market Grew 7.1% Year Over Year in 1Q19

FRAMINGHAM, Mass., May 30, 2019 – The combined consumer and enterprise worldwide wireless local area network (WLAN) market segments increased 6.9% year over year in the first quarter of 2019 (1Q19), finishing at \$2.4 billion. According to results published in the International Data Corporation ([IDC](#)) [Worldwide Quarterly WLAN Tracker](#), the enterprise segment grew 7.1% year over year in 1Q19 to reach \$1.4 billion while consumer WLAN market revenue increased 6.6%, finishing at \$1.0 billion. The market is being driven by enterprises continuing to upgrade their wireless infrastructure as users and devices rely on an increasing array of bandwidth-heavy applications.

The enterprise WLAN is now dominated by the 802.11ac standard, which makes up 86.4% of dependent access point (AP) shipments and 93.1% of enterprise WLAN dependent AP revenues. The next iteration of the standard, 802.11ax also known as WiFi 6, will increase in the market throughout the rest of 2019 and into 2020. In the consumer WLAN market, the 802.11ac standard accounted for 58.0% of shipments and 79.2% of revenue in 1Q19.

"The WLAN market continues to see steady, moderate growth as enterprises invest in wireless connectivity to support the continued demand for access technology," said [Brandon Butler](#), senior research analyst, [Network Infrastructure](#) at IDC. "Meanwhile, the coming WiFi 6 standard will be a major driver of growth in the WLAN market in the coming years, especially in the advanced enterprise segments of the market."

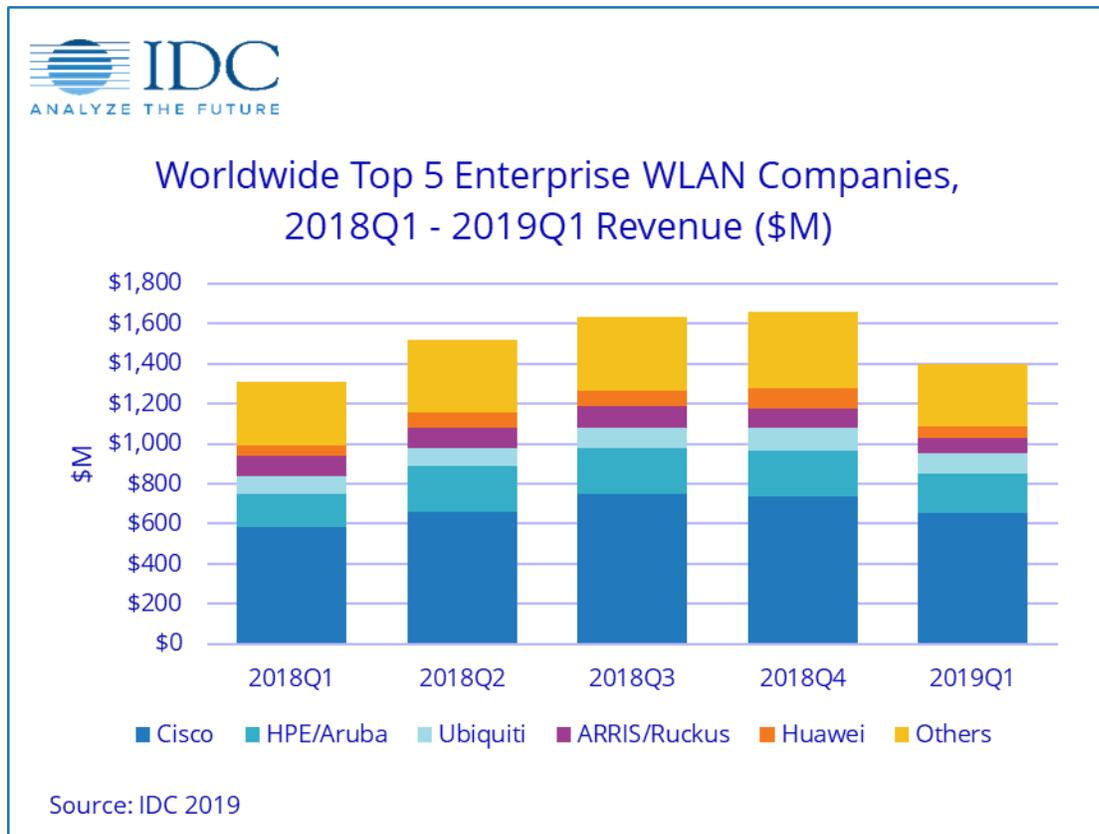
From a geographic perspective, the enterprise WLAN market saw its strongest 1Q19 growth in the Middle East & Africa region, which rose 23.8%. Notable growth in the region came from the United Arab Emirates increasing 25.7% year over year and Saudi Arabia growing 38.1%. The Western European region grew 10.8%, with the Netherlands up 20.4% and Norway growing 44.4%. Central and Eastern Europe grew 1.6% with the Czech Republic up 16.8% and Russia, the region's largest market, declining 15.8%. The Asia/Pacific region (excluding Japan) grew 2.4% with China increasing 9.0% year over year. Japan dropped 14.3% in 1Q19. The United States market grew 11.8% while Canada was off 0.4%.

"The enterprise WLAN market recorded growth across the globe, albeit with varying rates depending on the region," said [Petr Jirovsky](#), research director, [Worldwide Networking Trackers](#). "Vendors who hold the largest market share in the enterprise WLAN market drove growth in the most recent quarter, which is a positive sign for the WLAN industry in the future."

1Q19 Company Highlights

- **Cisco** saw its worldwide enterprise WLAN revenue increase 11.6% year over year in 1Q19. Cisco's worldwide market share came in at 46.8% in 1Q19, up from 44.3% in 4Q18. The company's Meraki cloud-managed WLAN portfolio remains one of the primary growth drivers for Cisco.
- **Aruba-HPE** revenues rose 20.3% year over year in 1Q19. Aruba-HPE's market share stands at 14.1% in 1Q19, up from 12.6% a year earlier.
- **Ubiquiti** revenue increased 17.8% year over year in 1Q19, accounting for 7.3% of the market.
- **ARRIS/Ruckus** revenue fell 27.6% year over year in 1Q19. ARRIS market share stands at 5.2%. After the end of 1Q19 (April 2019) CommScope completed the purchase of Ruckus Networks' parent company, ARRIS.
- **Huawei** revenues grew 9.3% year over year in 1Q19, giving the company 4.2% of the global market.

Figure 1



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 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's Worldwide Quarterly WLAN Tracker, please contact Kathy Nagamine (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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