

Software-Defined Wide Area Network (SD-WAN) Market Share 2025, PDF & Forecast Till 2032

SD-WAN market grows as enterprises adopt cloud, driving secure, agile, and cost-efficient networking solutions globally.

AUSTIN, TX, UNITED STATES,
September 3, 2025 /EINPresswire.com/
-- Market Size and Growth

The global [software-defined wide area network \(SD-WAN\) market](#), valued at US\$ 8.86 billion in 2024, is projected to reach US\$ 18.58 billion by 2032, growing at a CAGR of 12.2% from 2025 to 2032. The market is witnessing

robust growth driven by the rising adoption of cloud services, SaaS applications, and the increasing need for secure, agile, and cost-efficient networking solutions. Enterprises are rapidly shifting from traditional MPLS-based infrastructure toward SD-WAN to achieve greater scalability, centralized control, and optimized bandwidth usage across global operations.

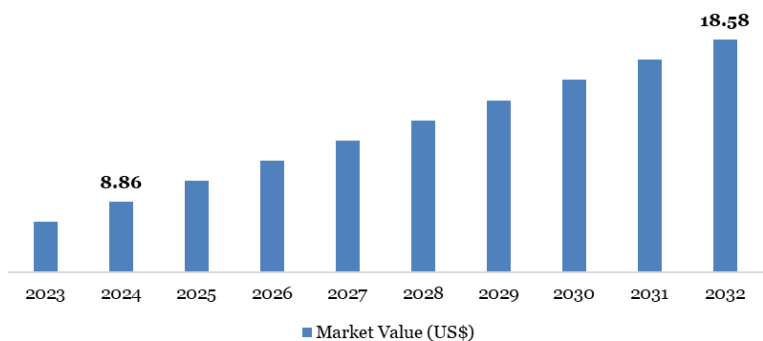
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The SD-WAN market in the USA and Japan accelerates as companies prioritize cloud security and next-gen network performance”

*DataM Intelligence 4Market
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in highly distributed environments.

Global Software-defined wide area network (SD-WAN) Market, 2023-2032 (In US\$ Billion)



Software-defined Wide Area Network (SD-WAN)
Market

The demand is further fueled by the rising focus on hybrid work models, accelerated digital transformation initiatives, and the integration of AI-driven automation and secure access service edge (SASE) frameworks. Service providers and technology vendors are collaborating to deliver managed SD-WAN offerings, enabling enterprises to simplify operations and strengthen cybersecurity posture

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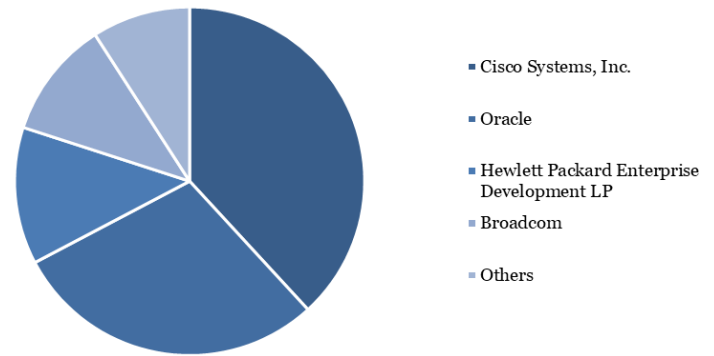
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Growing Adoption of Cloud-Based Deployment Driving Market Expansion

1. The cloud-based segment is a major growth driver in the global SD-WAN market, as enterprises increasingly embrace hybrid and multi-cloud strategies. Cloud-native SD-WAN solutions provide enhanced flexibility, centralized orchestration, and seamless integration with SaaS platforms such as Microsoft 365, Salesforce, and Zoom, ensuring consistent performance and security across distributed networks.

Global Software-defined Wide Area Network (SD-WAN) Market, Company Share Analysis, 2024



Software-defined Wide Area Network (SD-WAN) Market, Company Share Analysis

2. For instance, Microsoft and Versa Networks announced a collaboration to deliver cloud-delivered SD-WAN integrated with Microsoft Azure, enabling enterprises to improve application performance and security for remote and branch offices. Similarly, VMware SD-WAN by VeloCloud expanded its cloud gateway footprint in Asia-Pacific, reinforcing low-latency connectivity and secure access for global enterprises. These initiatives underscore how cloud-native deployments are shaping the future of SD-WAN adoption.

Integration Complexity and Legacy Infrastructure as a Restraint

Despite its rapid adoption, integration with existing legacy infrastructure remains a key restraint for the SD-WAN market. Enterprises with long-standing MPLS networks and complex IT environments face challenges in migrating to SD-WAN due to interoperability issues, high initial costs, and the need for specialized expertise.

However, this restraint is increasingly being addressed through managed SD-WAN and SASE offerings. According to a 2024 Futurium report, enterprises are turning to service providers for managed SD-WAN and secure access service edge (SASE) solutions to simplify deployment, reduce operational complexity, and strengthen cybersecurity. This counterbalance is helping enterprises overcome integration hurdles, fueling continued adoption.

Key Players

1. Cisco Systems, Inc.
2. Oracle
3. Hewlett Packard Enterprise Development LP

4. Broadcom
5. Forcepoint
6. Nokia
7. Huawei Technologies Co., Ltd.
8. Cloud Software Group, Inc.
9. Ciena Corporation.

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Technological Advancements Transforming SD-WAN Solutions

- The technological landscape of the SD-WAN market is evolving rapidly, driven by AI, automation, zero-trust security models, and edge computing integration. Modern SD-WAN solutions leverage AI-driven analytics, intent-based networking, and digital experience monitoring to provide proactive troubleshooting and real-time performance optimization.
- In 2024, Arista Networks acquired Broadcom's VeloCloud SD-WAN portfolio, strengthening its presence in the WAN and branch networking market. The acquisition brought AI-driven enterprise features such as Wi-Fi 7 access points, automated WAN troubleshooting, and zero-touch operations, enhancing scalability and operational ease. Likewise, Cisco introduced AI-native SD-WAN capabilities in 2025, enabling predictive insights, automated security policy enforcement, and seamless multi-cloud connectivity. These advancements highlight the role of technology in enhancing performance, security, and efficiency in SD-WAN solutions.

Cloud-Based Deployment Leading Market Growth

1. The cloud-based deployment segment dominates the SD-WAN market, as enterprises increasingly favor flexible, scalable, and cost-effective networking models. Cloud-managed SD-WAN allows businesses to optimize multi-cloud strategies while ensuring centralized security and visibility.
2. For instance, VMware SD-WAN by VeloCloud continues to gain traction among enterprises adopting hybrid cloud setups, while Cisco Meraki has strengthened its position by offering cloud-managed solutions with simplified deployment and integrated security.

North America Leading Market Growth

- North America dominates the global SD-WAN market, driven by strong enterprise adoption, high cloud penetration, and the presence of leading vendors such as Cisco, Fortinet, VMware, and Versa Networks. The region's emphasis on secure, cloud-native networking is fueling demand across verticals such as BFSI, healthcare, retail, and government.

- In 2025, Verizon Business expanded its partnership with Cisco, launching new managed SD-WAN services that offer global enterprises greater visibility, policy management, and security integration. Similarly, AT&T introduced SASE-powered SD-WAN services in the U.S., combining cloud-native security with wide-area networking to meet the growing demands of hybrid workforces. These initiatives highlight how North America remains at the forefront of SD-WAN adoption and innovation.

Market Segmentation

By Component: Solution, Services, Managed Services, Professional Services

By Deployment: On-premises , Cloud based

By Enterprise Size: Large Enterprises, SME's (Small and Medium Enterprises)

By Industry: IT & Telecom, Healthcare, BFSI, Manufacturing, Retail, Others

Conclusion

The global software-defined wide area network (SD-WAN) market is on a strong growth trajectory, supported by cloud adoption, hybrid work models, and the rising need for secure and scalable networking solutions. While challenges such as integration complexity and legacy infrastructure persist, managed SD-WAN and SASE offerings are helping enterprises overcome barriers and accelerate adoption.

With North America leading adoption, and Asia-Pacific rapidly expanding due to digitalization and cloud-first policies, the market is set to grow significantly. Technological advancements in AI, zero-trust security, and edge computing will continue to shape the next phase of SD-WAN evolution, positioning it as a cornerstone of enterprise networking in the digital era.

The market is shifting rapidly from standalone WAN optimization to single-vendor SASE platforms, where integrated networking and security are now buyer priorities. Vendor movements in the market such as Arista's acquisition of VMware VeloCloud and HPE's purchase of Juniper are reshaping competition, while standards such as MEF 70.1/LSO Sonata are driving inter-provider automation. For players, the winning strategy is clear: converge networking and security into unified platforms, deepen cloud on-ramp integrations (AWS/Azure/GCP), invest in AI-Ops for automation, and offer SD-WAN-as-a-Service models to capture enterprises seeking agility, simplicity, and measurable application experience improvements.

Why Choose This Global Software-defined Wide Area Network (SD-WAN) Market Report?

- Latest Data & Forecasts: In-depth, up-to-date analysis through 2032
- Regulatory Intelligence: Impact of data security and privacy regulations (GDPR, HIPAA, CCPA)

- Competitive Benchmarking: Profiles of leading players including Cisco, Broadcom, Versa Networks, Fortinet
- Emerging Market Coverage: Focus on Asia-Pacific economies such as India, China, and Japan
- Actionable Strategies: I-driven networking, managed SD-WAN, edge integration, and SASE adoption
- Expert Analysis: Research led by industry specialists with proven track records

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