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Virtual Desktop Infrastructure (VDI) Market Research Report - Global Forecast till 2030

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Description:

Global Virtual Desktop Infrastructure (VDI) Market Overview:

Virtual Desktop Infrastructure (VDI) Market Size was valued at USD 15.1 billion in 2021. The Virtual Desktop Infrastructure (VDI) market industry is projected to grow from USD 17.8 Billion in 2022 to USD 57.8 billion by 2030, exhibiting a compound annual growth rate (CAGR) of 18.20% during the forecast period (2022 - 2030). Growing demand for VDI technology led by the rising developments in industrialization and the ability to provide a more seamless and collaborative way of working, irrespective of location, are the key market drivers enhancing the market growth.

Global Virtual Desktop Infrastructure (VDI) Market Overview
Source: Secondary Research, Primary Research, MRFR Database and Analyst Review

Virtual Desktop Infrastructure (VDI) Market Trends

- **Growing Expansion of Cloud Computing to boost the market growth**

Most of the development in VDI technology can be attributed to the internationalization of cloud platforms. Undoubtedly, the VDI business is growing alongside the cloud computing sector. Various studies indicate a rise in cloud computing solutions during the forecast period. As remote and flexible work environments become more common, IT services will grow exponentially due to the increase in remote and flexible working environments that are available from numerous devices in multiple places. Integration of VDI services makes integration of these services highly reliable.

The virtual desktop infrastructure market is witnessing rapid growth owing to declining hardware prices, including GPUs, storage, and flash memory. Additionally, increasing utilization of high-speed solid-state drives and sophisticated GPUs is widening the footprint of Desktop-as-a-Service (DaaS) providers for offering near-zero latency experience on their VDI platforms. Network performance is expected to improve rapidly with the introduction of software-defined networking and 5G networks; virtual desktop solutions are anticipated to match the performance of physical PCs, creating new growth opportunities for the market.

Increased government spending on digitization and IT infrastructure across various areas, increased BYOD (bring your device) policy implementation and expanding IoT use all contribute to the market's expansion. Studies indicated that around 10 billion IoT devices were in use as of 2021; it is predicted that number will rise to 25 billion by 2030. Additionally, an ongoing trend of IT consumption is rapidly shifting. Various businesses and organizations are transforming automation and virtualization, which has increased the adoption of cloud computing solutions. These elements generate prospective growth prospects for the market for virtual desktop infrastructure. Increased productivity and seamless work are further increasing the growth of the virtual desktop infrastructure (VDI) market CAGR across the globe in recent years.

These systems offer increased user flexibility on remote access as a unform desktop can be further accessed from a compatible and approved endpoint from any location in the world. This is another factor driving the growth of the Virtual Desktop Infrastructure (VDI) market revenue.

Virtual Desktop Infrastructure (VDI) Market Segment Insights:

Virtual Desktop Infrastructure (VDI) Component Insights

The Virtual Desktop Infrastructure (VDI) Market segmentation, based on component, includes software and service. The software segment held the majority share in 2021 contribution to around ~75-77% in respect to the Virtual Desktop Infrastructure (VDI) Market revenue. This is primarily owing to the integration of various OS as they include a wide range of resources including drivers, CPUs, and memory. Software services often run from a security layer known as a hypervisor. Additionally, the rapidly growing utilization of specialized cloud computing services such as server accessibility, database storage, and wider-range application services over the internet is expected to increase the footprint of the segmental growth.

December 2020: The Defense Information Systems Agency (DISA) in the US announced that they were seeking a private sector partnership for providing engineering, sustainment, technical, and operation support for the VDI and cloud storage applications. The support will extend towards requiring DISA's cloud storage portfolio that will connect

data producers, users, applications, and devices into a decentralized and secure cloud storage platform on the Department of Defense Information Network (DoDIN), Non-classified Internet Protocol Router Network (NIPRNet), and Secret Internet Protocol Router Network (SIPRNeT).

April 2020: With the COVID-19 epidemic underway, Hewlett Packard Enterprise (HPE) unveiled new virtual desktop infrastructure (VDI) technologies to handle the dramatic increase in remote work. For enterprises of all sizes, HPE's beefier VDI solution includes different pre-configured solutions built on its servers.

Virtual Desktop Infrastructure Market Share

Source: Secondary Research, Primary Research, MRFR Database and Analyst Review

Virtual Desktop Infrastructure (VDI) Application Insights

The Virtual Desktop Infrastructure (VDI) Market segmentation, based on application, includes IT & telecommunication, media & entertainment, education, healthcare, BSFI, government, and retail & manufacturing. IT and telecommunication is expected to occupy the largest market share during the forecast period owing to increased rapid adoption of virtualization and VDI solutions since the pandemic combined rising adoption of services within the sector. According to the United Nations Conference on Trade and Developments (UNCTAD), the global economy of the digital economy ranges from 4.5%-15.5% owing to increased adoption of VDI services. Hence, rising adoption of VDIs for providing advanced workplace management will positively impact the market growth. The BSFI segment will grow with the fastest growing CAGR during the forecast period owing to increased adoption of online banking services among the general population.

Virtual Desktop Infrastructure (VDI) Type Insights

The Virtual Desktop Infrastructure (VDI) Market data has been bifurcated by on-premise and cloud-based. The cloud-based virtual desktop infrastructure is expected to occupy the largest market share owing to its cost-effective nature and increasing infrastructure development within various developing economies such as India, Australia, France, Germany, and Canada. Also, the vendors providing cloud-based services are extremely focused on a high-level security patch for determining the risk of a cyber-attack.

July 2020: 10ZiG Technology, a market leader in virtual infrastructure development and server-based computing environments, a partnership with Zoom, a leader in modern enterprise video communications. This partnership is expected to integrate 10ZiGs cutting-edge endpoint hardware and software with Zoom's unique architecture to provide optimized video and audio meeting solutions. These factors are expected to boost the Virtual Desktop Infrastructure (VDI) industry.

April 2020: NetApp, a leader in cloud data services, announced the acquisition of CloudJumper, a leading cloud software company in the VDI and RDS markets. The acquisition would enable NetApp to successfully manage the most challenging problems of virtual desktop services and application, allowing customers to deploy, manage, monitor, and optimize those environments as a total solution from a single company on the public cloud of their choice.

Virtual Desktop Infrastructure (VDI) Regional Insights

By Region, the study provides the market insights into North America, Europe, Asia-Pacific and Rest of the World. North America virtual desktop infrastructure (VDI) market accounted for USD 6.3 billion in 2021 and is expected to exhibit a significant CAGR growth during the study period. This is attributed to the presence of many key players and the growing regional industrial sector.

Further, the major countries studied in the market report are: The U.S, Canada, Germany, France, UK, Italy, Spain, China, Japan, India, Australia, South Korea, and Brazil.

Figure 3: Virtual Desktop Infrastructure (VDI) Market SHARE BY REGION 2021 (%)

Virtual Desktop Infrastructure (VDI) Market SHARE BY REGION 2021

Source: Secondary Research, Primary Research, MRFR Database and Analyst Review

Europe Virtual Desktop Infrastructure (VDI) market is expected to grow in market share during the forecast period owing to increased rapid adoption of BYOD policies and the increasing penetration of smartphones in the region increase the virtual desktop infrastructure market share. Additionally, rising investments in technology developments and the rising adoption of VDI for simulation and training purposes will add to the regional growth. Further, the Germany Virtual Desktop Infrastructure (VDI) market held the largest market share, and the UK Virtual Desktop Infrastructure (VDI) market was the fastest growing market in the European region

The Asia-Pacific Virtual Desktop Infrastructure (VDI) Market is expected to grow at the fastest CAGR from 2022 to 2030. Factors such as rising concerns regarding information security in the region and increased frequency of cyber-attacks will account for a wider segmental growth of the region. Moreover, China Virtual Desktop Infrastructure (VDI) market held the largest market share, and the India Virtual Desktop Infrastructure (VDI) market was the fastest growing market in the Asia-Pacific region

For instance, India Virtual Desktop Infrastructure (VDI) market is expected to grow significantly during the forecast period owing to increased data breaches and cyber-related attacks on federal systems over the past years. Additionally, corporations are becoming increasingly vulnerable to numerous attacks that range from infecting corporate networks by custom malware for targeting hacking combined with sophisticated phishing attacks and outright tampering with intellectual property. The rising adoption of bring-your-own devices (BYOD) and increased security concerns will increase the footprint of India's virtual desktop infrastructure (VDI) market in the region.

Virtual Desktop Infrastructure (VDI) Key Market Players & Competitive Insights

Major market players are increasing their spending on their research and development departments, which is expected to increase the footprint of the Virtual Desktop Infrastructure (VDI) market growth exponentially. The prominent leaders in the market are widening their consumer base by employing various strategies such as integrating key market developments including new product launches, contractual agreements, mergers and acquisitions, increased investments, and collaboration with other organizations. Market leaders in the virtual desktop infrastructure (VDI) industry are offering cost-effective solutions for keeping their competitive place.

The primary strategy within the virtual desktop infrastructure (VDI) industry are to reduce operational costs. During the recent years, the virtual desktop infrastructure (VDI) industry has provided products that are benefitting their end-use verticals by introducing a wider range of products. The virtual desktop infrastructure (VDI) market major player such as NComputing Inc. (US), Citrix Systems Inc (US), Cisco Systems Inc. (US), Huawei Technologies Co. Ltd (China), and others are working to expand the market demand by investing in research and development activities.

Huawei was established in 1987 and is now a major player in smart devices and ICT infrastructure. They serve more than three billion people worldwide and employ more than 195,000 people and operate in more than 170 nations and areas. Huawei operates to create a fully connected by bringing digital technology to consumers, homes, and organizations. To accomplish this, the company pushes for widespread connectivity and advocates for equal access of networks by delivering diversified computing power for ubiquitous cloud and intelligence.

Microsoft is a market leader in digital transformation in the intelligent edge and cloud age. In 1990, Microsoft established its operations in India and provides local data centers in India with access to its worldwide cloud services to speed up the digital transformation of Indian start-ups, corporations, and governmental institutions. Microsoft assists businesses by combining their resources, data, and other processes to create valuable services for their consumers and keep a competitive edge in a digital-first world.

Key Companies in the Virtual Desktop Infrastructure (VDI) market includes

- NComputing Inc. (US)
- Citrix Systems Inc (US)
- Cisco Systems Inc. (US)
- Huawei Technologies Co. Ltd (China)
- RedHat Inc (US)
- Hewlett Packard Enterprise Company (US)
- Microsoft Corporation (US)
- VMware Inc. (US)
- Oracle Corporation (US)
- Amazon Web Services (US)
- Evolve IP LLC. (US)
- Parallels International GmbH (Germany), among others

Virtual Desktop Infrastructure (VDI) Industry Developments

May 2023: To create its own Web3 ecosystem, NComputing, a prominent supplier of the virtual desktop infrastructure, has partnered with My Flex, an EQBR business. In order to make it simpler for NComputing's clients and end users to buy its goods & services directly or through partners and resellers around the world while providing a flexible rewards program, the partnership aims in deploying the next generation payments & rewards solution. NComputing intends to create its own Web3-powered payment and incentives system through this agreement, enabling its clients to do business safely and easily. The firm wants to give its partners and resellers a fast and affordable payment option so they may buy VDI solutions and develop channel interaction plans with the end customers while taking use of Web3 technology's benefits.

April 2023: The most recent version of Real-Time DX 8.8, the end-to-end monitoring & troubleshooting solution for the Virtual Desktop Infrastructure and Desktop-as-a-Service settings, was released lately by ControlUp, a pioneer in Digital Employee Experience (DEX) management. ControlUp can now offer monitoring, alerting, & remediation capabilities to the Azure Virtual Desktop in the same manner it does for Citrix and VMware Horizon systems thanks to hundreds of new metrics, including 162 particularly for Azure Virtual Desktop. With only one control plane, ControlUp supports all of the main cloud VDI platforms, such as Citrix, VMware Horizon, and Azure Virtual Desktop. If customers need to relocate, scale up, or deploy resources either on-premises or in the cloud, they can pick the best EUC platform for their environment.

October 2022: Amazon Workspaces Core, an infrastructure-only completely-managed Virtual

Desktop Infrastructure product, is a recent addition to Amazon Workspaces from AWS. Additionally, clients may set up Ubuntu desktops for their data scientists, engineers, and developers on Amazon Workspaces. It allows end users to continue using their current VDI client software while allowing IT managers to continue utilizing their comfortable VDI software solution. The end-user experience thus is uniform as a consequence.

September 2019: VMware announced that they were increasing the availability of Horizon 7 version 7.10, CART 5.2, App Volumes 2.18, and DEM 9.9. This release has various enhancements including the new functionality to HTML5-based Horizon Console enhancements in their Remote Desktop Services Hosts (RDSH) capabilities and other troubleshooting capabilities in Horizon 7.10

February 2019: Nexenta announced a partnership with Cisco for delivering Nexenta's software-based enterprises file services to the Cisco HyperFlex solutions. This will enable the increasing utilization of cases including Virtual Desktop Infrastructure (VDI), Remote Office/Branch Office (ROBO) and Backup/Disaster Recovery (BDR), Support for Legacy Enterprise, New-Cloud Native, and 5G-driven Telco Cloud Apps.

Virtual Desktop Infrastructure (VDI) Market Segmentation:

Virtual Desktop Infrastructure (VDI) Component Outlook

- Software
- Service

Virtual Desktop Infrastructure (VDI) Application Outlook

- IT & Telecommunication
- Media & Entertainment
- Education
- Healthcare
- BFSI
- Government
- Retail & Manufacturing

Virtual Desktop Infrastructure (VDI) Type Outlook

- On-Premise
- Cloud-based

Virtual Desktop Infrastructure (VDI) Regional Outlook

- North America
    - US
    - Canada

- Europe
    - Germany
    - France
    - UK
    - Italy
    - Spain
    - Rest of Europe
- Asia-Pacific
    - China
    - Japan
    - India
    - Australia
    - South Korea
    - Australia
    - Rest of Asia-Pacific
- Rest of the World
    - Middle East
    - Africa
    - Latin America

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