

Global IP Proxy Networks Market

FROST & SULLIVAN

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Executive Summary

Key Findings

- Websites increasingly change their displayed information based on user IP address, location, and demographic attributes. This creates a need for companies to do competitor analysis, price comparisons, and data extraction as a simulated user to capture this customized information. Companies not familiar with these website practices or Internet Protocol proxy network (IPPN) solutions are at risk of gathering incorrect data and left behind technology-wise.
- Frost & Sullivan estimates the Total Addressable Market (TAM) for IPPNs in 2018 to be \$951.0 million, the Service Available Market (SAM) to be \$358.9 million, and the Service Obtainable Market (SOM) to be \$76.3 million. \$76.3 million is the combined revenue from market participants in 2018. This IPPN market is forecasted to grow at a CAGR of 16.8% and reach \$259.7 million by 2025.
- This global IPPN market study includes revenues from residential IP proxy networks, data center IP proxy networks, and mobile IP proxy networks. Use cases include: price comparison, ad verification, data collection, fraud protection, application performance, brand protection, talent sourcing, cyber security, and account management.
- EMEA makes up 39.5% of revenues for the IPPN market in 2018, followed by NALA at 35.4%, and APAC at 27.7%. By 2025, NALA's 37.9% market share overtakes EMEA's 34.4% of IPPN market. Thanks to demographic trends and an increasing number of its residents developing online presences, APAC has fastest overall CAGR at 18.7% growing to a 27.7% market share by 2025.
- Market leader Luminati, which practically invented the category, and competitors Oxylabs and GeoSurf, make up 77.0% of the global IPPN market in 2018 with significant potential to grow as IPPN solutions become more well-known.

Source: Frost & Sullivan

IPPN TAM, SAM, and SOM

Key Takeaway: With a 2018 SOM of \$76.3 M obtained by the Frost & Sullivan forecasting method, coupled with a SAM of \$358.9 M and a TAM of \$951.0 M, the IPPN market is still in its early phases with tremendous potential for growth as more enterprises become aware of its advantages.

Total IPPN Market: TAM, SAM, and SOM, Global, 2018



IPPN Total Addressable Market (TAM)

Number of companies, globally, applicable to market use cases multiplied by average selling price (ASP).

IPPN Service Available Market (SAM)

In-House IPPN Use based on data center IP address allocation combined with revenue from dedicated solution providers.

IPPN Service Obtainable Market (SOM)

Revenue from dedicated IPPN solution providers, such as Luminati, Oxylabs, and GeoSurf.

Source: Frost & Sullivan

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