KiwiCloud Academy

# UEM Market Research

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## 1. Executive Summary

In recent years, there has been a rapid expansion of digital devices and hybrid work environments. This has led to new challenges for businesses looking to better and more efficiently manage and secure their technological systems. Over the last couple of decades, device management has gone through an evolution. It has gone from basic Mobile Device Management (MDM) to Unified Endpoint Management (UEM). UEM allows for a more inclusive framework that combines mobile, desktop, and IoT management under a single system platform. UEM has become crucial in the current market for establishing operational efficiency, cybersecurity resistance, and simplified comprehensive IT oversight. This research analyzes the current state of the UEM landscape, looking through key trends, especially in North American markets, allowing for opportunities for KiwiCloud to position itself within this rapidly growing and evolving space.

The analysis found evidence of the rapid growth and expansion of the UEM market as it's driven by hybrid work and technological strengths in the workforce. This increases the need for strong cybersecurity entities. North America is leading globally in total UEM revenue, accounting for

approximately 40%. In 2023, the market around USD 4 billion is projected to increase beyond 30 billion by 2031. This represents a compound annual growth rate of more than 30 percent. The major vendors like Microsoft, VMware (Broadcom), IBM, and Ivanti lead in the enterprise sectors, as the smaller vendors like Hexnode, AirDroid, and ManageEngine provide for SMBs within more limited functions. This draws the line in showing a gap in the market for more practical solutions in terms of scale, affordability, and universal usage.

When it comes down to SMBs, there are key factors in the development and adoption of UEM tools that must be considered for quick turnaround. Training extent and requirements, deployment, and predictable pricing are all things to consider. Most of the products found within the enterprise-level are priced between $10 and $20 per device, with SMBs more likely to lean towards plans ranging from $2 to $5 per device. KiwiCloud's integration of iMin hardware with the pre-installed UEM software can address the gaps with ready-to-go and easy-to-use solutions. This tailors to these SMB businesses in consumer style sectors like retail and food service.

**Key Insights:**

- **Market Growth:** UEM system adoptions are rapidly increasing globally, with a North American lead in earnings and innovation.
- **Competitive Landscape:** Enterprise tools remain powerful but not necessarily incredibly simple, while lower-cost solutions often lack the comprehensive automation and other sought-after features and capabilities.
- **SMB Priorities:** Smaller organizations seek more affordable, user-friendly, easy-to-manage platforms that require less setup and advanced training.
- **Proven ROI:** Industry studies show UEM adoption can deliver 260 to 440% ROI, reduce IT support tickets by 20 to 40%, and lower setup time from several days to under one hour.
- **Opportunity for KiwiCloud:** By providing a unified, cloud-first platform focused on SMBs, KiwiCloud can address a key gap between enterprise complexity and lightweight solutions.

# 2. Objectives & Questions

## 2.1. Objective

- To explore the current landscape of Unified Endpoint Management (UEM) and identify opportunities for KiwiCloud to provide a competitive, SMB-focused solution.
- To understand key industry trends, customer pain points, and gaps in existing tools that UEM solutions address.
- To assess best practices in training, adoption, and ROI evidence for UEM platforms to inform KiwiCloud Academy content and approach.

## 2.2. Research Questions

- What are the main trends in UEM adoption across enterprise and SMB markets in North America?
- Who are the key competitors, and what are their strengths, weaknesses, and target markets?
- How do existing UEM solutions address security, efficiency, and cost concerns for businesses?
- What measurable benefits (ROI/TCO, onboarding time, IT support reduction) can UEM provide for SMBs?
- How can KiwiCloud differentiate its product offering and training approach from competitors?

## 2.3. Scope

- Focus on North American SMB and mid-market organizations.
- Include both quantitative data (market growth, ROI/TCO stats) and qualitative insights (case studies, user experiences).
- Examine UEM adoption across sectors relevant to KiwiCloud: retail, F&B, healthcare, and small corporate fleets.

# 3. Background & Context

As the use of multiple devices drastically rises within our everyday lives, it becomes increasingly harder to manage and secure each device as a whole within corporations. The need for device management can be traced back to the beginnings of mobile technology in the 1990s. The introduction and rise of mobile phones made it apparent to businesses that securing and managing

them was necessary, leading to the rise of Mobile Device Management (MDM) in the early 2000s. A basic MDM tool was able to secure, track, and monitor the device. However, with the rapid development of smartphones and applications came the need for more secure and efficient management, thus the emergence of Mobile Application Management (MAM) and Mobile Content Management (MCM). These allowed corporations to lock down enterprise apps, track data, and manage content rather than just managing the device.

Enterprise mobility management (EMM) emerged as a more unified solution in the early 2010's, combining the characteristics of MDM, MAM, and MCM. This allowed businesses to manage the entire mobile landscape: mobile devices, apps, users, and data. However, EMM failed to manage all devices such as desktops, laptops, and IoT devices. Unified Endpoint Management (UEM) arose in the late 2010's to correct this issue, unifying all endpoints of a corporation (mobile devices, laptops, desktops, IoT devices) and allowing IT teams to work from one unified platform. UEM also integrates better security posture by compiling identity frameworks and zero trust platforms. While many may still EMM and MDM often lack the full-package endpoint coverage and cross platform integration that UEM provides. Without it, other enterprise endpoints such as POS systems, IoT devices, printers, and wearables remain at risk of cyber threats.

From 2019 to the present, UEM has entered a new era driven by hybrid work environments, cloud adoption, and the rise of AI-driven security and automation. Modern UEM platforms now focus on enhancing both security and employee experience, supporting remote work, predictive device management, and seamless multi-device productivity. The market's leading vendors — including Microsoft, VMware, IBM, and Ivanti — continue to innovate in areas like cloud scalability, zero trust integration, and intelligent analytics. In this ever-evolving device management landscape, KiwiCloud positions itself as an emerging UEM platform focusing on cloud-first scalability and simplified endpoint management.

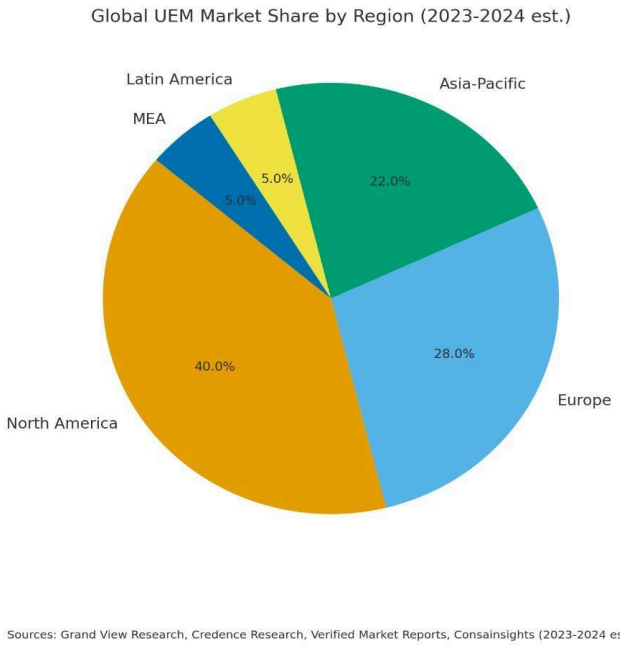
# 4. Findings & Analysis

## 4.1. Global Market Overview

The UEM market is expanding rapidly not just in North America, but across the globe, driven by the universal need for organizations to manage an increasingly complex array of devices and endpoints. With the proliferation of mobile devices, laptops, IoT devices, and cloud applications, businesses of all sizes and industries are seeking centralized solutions to maintain security, compliance, and operational efficiency.

During the 2023–2024 period, North America emerged as the leading region in Unified Endpoint Management (UEM) earnings, accounting for approximately 40% of the global market share. This dominant position underscores the region's strong technological infrastructure, early adoption of advanced enterprise mobility solutions, and a mature base of IT and cybersecurity investments.

Additionally, the surge in remote and hybrid work models, accelerated by post pandemic operational shifts, has amplified the need for centralized device management and secure access solutions. North America continues to set the pace for UEM revenue generation and is expected to maintain a leading position in the global market in the years ahead.

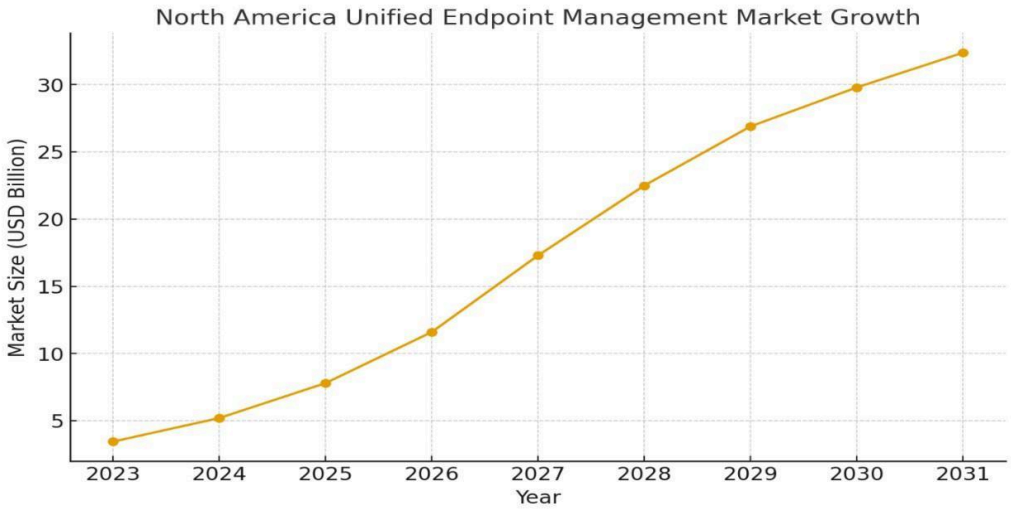


The pie chart above illustrates this geographic distribution, emphasizing the global scale of UEM adoption. The continued integration of cloud computing, automation, and endpoint security frameworks underscores UEM's critical role in global digital transformation.

## 4.2. North American Market Growth:

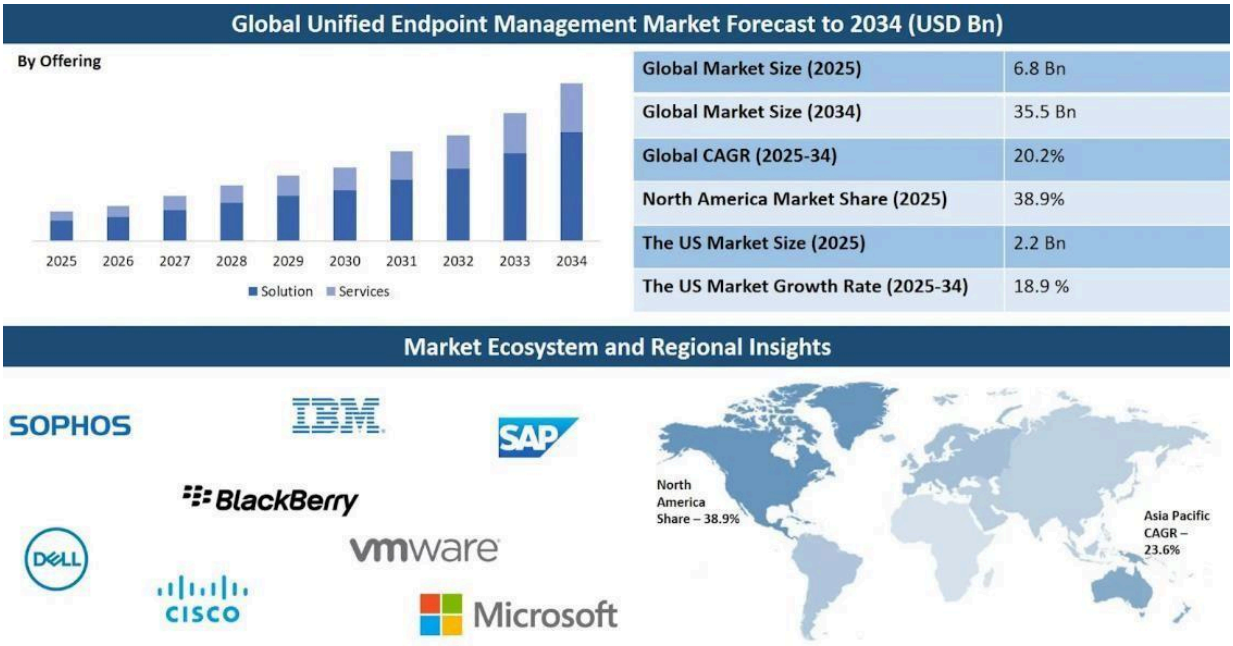
The North American Unified Endpoint Management (UEM) market is projected to experience substantial growth over the next several years, reflecting the region's increasing adoption of digital transformation and advanced endpoint security solutions. Valued at approximately USD 4 billion in 2023, the market is expected to surge to over USD 30 billion by 2031, driven by rapid advancements in cloud computing, enterprise mobility, and cybersecurity. This impressive expansion represents a compound annual growth rate (CAGR) exceeding 30% during the forecast period.

Several factors are fueling this growth, including the widespread use of remote and hybrid work models, which require organizations to manage a diverse range of devices from desktops and laptops to mobile phones and IoT endpoints under a unified platform. Additionally, rising concerns over data breaches and regulatory compliance are pushing businesses to invest in robust endpoint management solutions that offer centralized control, automation, and enhanced visibility.




Source: Business Market Insights (2023) – North America Unified Endpoint Management Market Report
Projection CAGR ~32.3% (2023–2031)

## 4.3. U.S. Unified Endpoint Management Market:



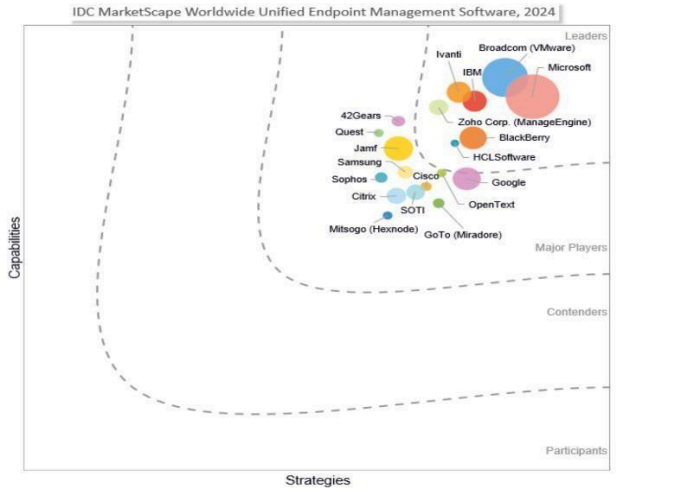

The United States plays a pivotal role in the global Unified Endpoint Management (UEM) market, supported by its advanced IT infrastructure, widespread remote work adoption, and strong emphasis on cybersecurity. The market was projected to reach USD 2.2 billion by 2025, growing at a compound annual growth rate (CAGR) of 18.9%. Many leading UEM vendors are headquartered in the U.S. driving continuous innovation and setting international benchmarks for security and device management. Organizations across sectors such as finance, healthcare, and technology increasingly depend on UEM solutions to manage diverse endpoints and ensure data protection. Additionally, government regulations on data security and compliance are fueling further adoption. The rapid integration of artificial intelligence (AI), cloud computing, and Bring Your Own Device (BYOD) policies within corporate environments continue to expand the need for centralized endpoint control. With its large customer base and mature digital ecosystem, the U.S. remains a leader in shaping the direction and growth of the global UEM industry.

## 4.4. Competitor Landscape:

The UEM market remains fragmented and highly competitive, with vendors specializing in distinct niches rather than competing across all device environments. The IDC MarketScape (2024) assessment highlights several key players: Microsoft, VMware (Broadcom), IBM, and Ivanti lead the enterprise segment due to strong capabilities and established ecosystems. Microsoft Intune dominates large Windows-based organizations but is less suited for smaller businesses or IoT-heavy operations. VMware Workspace ONE is favored by enterprises with mixed platforms but is often criticized for being complex and expensive to deploy.

Jamf leads the Apple-only market, while SOTI focuses on rugged devices used in logistics and retail. Ivanti and IBM remain strong in heavily regulated industries, such as healthcare and finance, due to their compliance frameworks. On the other end of the spectrum, Hexnode, AirDroid, and ManageEngine serve small and medium-sized businesses (SMBs) with affordable, lightweight solutions, though they lack the enterprise depth and scalability of larger platforms.

**IDC MarketScape Worldwide Unified Endpoint Management Software Vendor Assessment**




Source: IDC, 2024

This creates a clear gap in the market: enterprise-grade tools are often too complex and costly for SMBs, while budget solutions fail to provide advanced automation, analytics, and compliance support.

KiwiCloud, with its integration of iMin hardware and pre-installed UEM software, is well-positioned to fill this mid-tier space, offering a plug-and-play solution tailored for industries like retail, cafés, and quick-service restaurants (QSRs).

## 4.5. Buying Behavior:

When organizations evaluate Unified Endpoint Management (UEM) solutions, their decision process usually balances functionality, ease of adoption, and cost. In large enterprises, decision making involves IT operations, cybersecurity, and infrastructure management teams. These buyers emphasize scalability, automation, and deep integration with existing ecosystems such as Microsoft Entra ID or VMware Workspace ONE. Microsoft's Intune is often selected because of its ability to integrate with other Microsoft services, creating a bundled ecosystem that simplifies license management. A Forrester-commissioned Total Economic Impact (TEI) study found that Intune achieved an estimated 181 percent return on investment for an enterprise managing 30,000 endpoints, primarily due to reduced licensing complexity and improved IT productivity.

Smaller and mid-sized businesses approach the buying process differently. They tend to prioritize fast deployment, minimal training requirements, and predictable monthly pricing. IDC's MarketScape report shows that while over 70 percent of large organizations operate multiple endpoint management tools, fewer than 40 percent of SMBs do, indicating a clear demand for unified, simple-to-manage solutions. SMB buyers also prefer transparent pricing structures, typically around two to five dollars per device each month, whereas enterprise platforms often range between ten and twenty dollars per device depending on bundled features. This pricing gap leaves a space in the mid-tier market where KiwiCloud can position itself. By combining iMin hardware and pre-installed management software, KiwiCloud can deliver a full solution that offers enterprise-level reliability at a price small businesses can afford.

## 4.6. ROI Evidence:

Independent research consistently shows that Unified Endpoint Management (UEM) delivers strong financial and operational returns. Forrester's TEI report on ManageEngine Endpoint Central found a 442 percent ROI over three years, with more than four million dollars in net benefits from reduced patching labor, simplified compliance, and lower licensing costs. Ivanti's 2024 analysis similarly reported a 261 percent ROI driven by automation and consolidated software spending. Operational data reinforces these results: Microsoft Intune users in Forrester's sample saw 20–40 percent fewer help-desk tickets after centralizing endpoint management. A global bank managing 120,000 devices achieved a 65 percent drop in level one and two support tickets and a 38 percent improvement in resolution time, while Jamf customers reported daily support requests falling from fifty to about twenty per site following automation and self-service adoption.

Cost efficiencies primarily stem from software consolidation and faster provisioning. Organizations typically spend fifteen to twenty dollars per device per month on fragmented tools, compared with five to ten dollars under a unified UEM model, generating annual savings of about twelve thousand dollars per one hundred devices. Zero-touch provisioning reduces setup time from several days to under one hour, saving more than fifty thousand dollars per one hundred new hires each year. These findings demonstrate that UEM adoption provides both immediate and long-term financial impact.

It is important to note, however, that all ROI and cost figures referenced here originate from publicly available Forrester, IDC, and vendor-commissioned studies rather than our own calculations. They should be interpreted as directional indicators of industry trends, not as guarantees of identical outcomes.

## 4.7. Client Fit and Gaps:

Research shows that companies adopt UEM mainly for three reasons: better security, easier device management, and higher efficiency. As more people work remotely, the number of devices connecting to company networks has grown fast. IBM's 2024 Cybersecurity Index found that 45 percent

of corporate data breaches come from devices that are not properly managed. UEM platforms help prevent this by adding encryption, multi-factor authentication, and real-time security checks. Entgra's 2024 study showed that these tools can cut unauthorized network access by over 60 percent. Many companies also struggle with using different devices like Windows, macOS, iOS, Android, IoT, and POS systems. HP's 2025 report showed that by using UEM to manage all 350,000 of its devices in one system, it reduced manual updates and improved system uptime.

UEM also makes daily operations faster and easier. Automating setup, software updates, and app installations helps IT teams save time and reduce mistakes. HP found that the time to prepare new laptops dropped from several days to under one hour, and help-desk tickets fell by about 30 percent. These results show that UEM systems not only protect company data but also save money and time by managing all devices through one unified platform.

## 5. Main Takeaways:

Unified Endpoint management has evolved into a vital solution for businesses and corporations struggling to manage the challenges of hybrid work, diverse devices, and increased cloud adoption. UEM is gaining traction worldwide, with North America currently leading the market with a share of around 40%, while adoption of UEM steadily increases in other regions such as Europe and Asia. Although VMware Workspace One and Microsoft Intune currently dominate the market, the software is often too complex and costly for smaller businesses.

On the other hand, lightweight tools often better fit the needs of smaller businesses (SMBs), but they often lack depth in automation, analytics, and compliance. This critical gap in the mid-tier industry requires a solution that combines ease of use, lower costs, and robust functionality. KiwiCloud is uniquely positioned to fill this gap by offering a cloud-first, pre-installed UEM solution bundled with iMin hardware, offering enterprise-level reliability with simplified deployment and small business friendly pricing. As the UEM industry continues to grow, KiwiCloud offers a compelling solution for businesses who seek to unify endpoint management, while avoiding the complexity and high costs associated with traditional enterprise tools.

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