The Global M2M/IoT Terminal Market

The Global M2M/IoT Terminal Market is the second consecutive strategy report from Berg Insight analysing the latest developments on the cellular router, gateway and modem market.

This strategic research report from Berg Insight provides you with more than 110 pages of unique business intelligence including 5-year industry forecasts and expert commentary on which to base your business decisions.

Highlights from this report:

♦ **Insights** from 30 executive interviews with market-leading companies.

♦ **Summary** of the M2M/IoT hardware value chain.

♦ **In-depth analysis** of market trends and key developments.

♦ **Updated profiles** of 26 cellular terminal vendors and 9 module vendors.

♦ **Overview** of certifications required for cellular devices.

♦ **Price comparisons** between terminal vendors.

♦ **Market forecasts** lasting until 2022.

Shipments of cellular M2M terminals to reach 13.7 million by 2022

Berg Insight defines cellular terminals as standalone devices intended for connecting machines to a cellular network. These include primarily general-purpose cellular routers, gateways and modems that are enclosed in a chassis with at least one input/output port. Trackers, telematics devices and other specialised devices are excluded from this report. Berg Insight has found that 4.9 million M2M terminals were sold globally during 2016 at a total market value of approximately US$ 875 million. The Asia-Pacific region was the largest market in terms of annual shipments during 2016 with about 1.93 million units sold in the region. Europe was with 1.44 million sold units the second largest global market, followed by the Americas with shipments of about 1.40 million units. In terms of revenues, the Americas is a considerably larger market than Asia-Pacific and Europe with an estimated US$ 350 million in revenues compared to US$ 260 million and US$ 245 million respectively. Average terminal prices in North America have increased as a result of a high share of 4G LTE routers and gateways in the product mix. Berg Insight forecasts that shipments of M2M terminals will grow at a CAGR of 18.8 percent in the next five years to reach 13.7 million units in 2022.

The M2M terminal vendor landscape is more fragmented than the M2M module market. Two M2M terminal vendors have a global market share of more than 10 percent each. Berg Insight ranks China-based SIMCom as the market leader with US$ 181 million in revenues from sales of approximately 1.7 million terminals. US-based Cradlepoint is the second largest provider with an estimated US$ 115 million in revenues from terminal sales. Top players further include Sierra Wireless and Digi International which generated US$ 72 million and US$ 47 million respectively from their terminal businesses. These four vendors held a combined market share of close to 50 percent in 2016. Other notable vendors are CalAmp, MultiTech Systems, Encore Networks and Systech in North America, Xiamen Four-Faith, Maestro Wireless, InHand Networks, Robustel Technologies and NetComm Wireless in the Asia-Pacific region, and Teltonika, HMS Networks, Advantech B+B SmartWorx, NetModule, Matrix Electrónica, Eurotech, Gemalto, Dr. Neuhaus and Option in Europe.
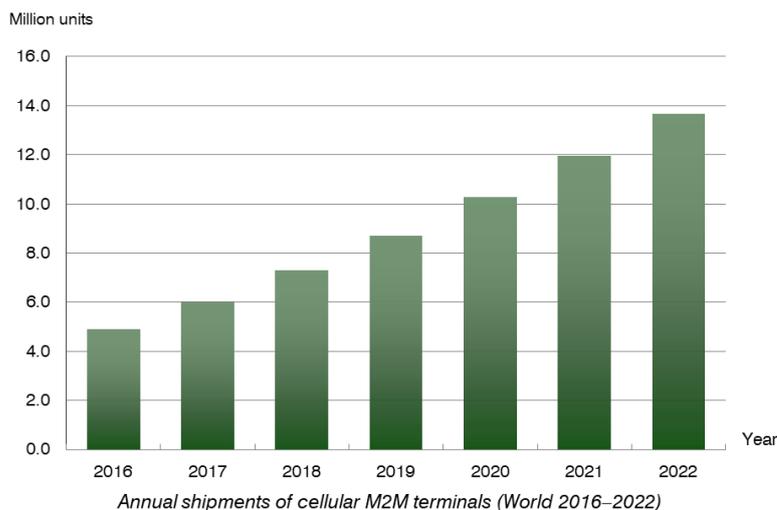
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This report answers the following questions:

- ♦ Which are the leading providers of cellular M2M terminals?
- ♦ Which are the drivers and barriers on the M2M terminal market?
- ♦ How does the M2M terminal market differ between regions?
- ♦ Which M2M/IoT applications are suitable for the M2M terminal form factor?
- ♦ How will LTE Cat-M1 and NB-IoT affect the M2M terminal market?
- ♦ Which cellular M2M module vendors are also active on this market?
- ♦ How will the cellular M2M terminal market evolve over the next five years?

Million units

Annual shipments of cellular M2M terminals (World 2016–2022)

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