

The Global Cellular IoT Gateway Market

The Global Cellular IoT Gateway Market is the third 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 120 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 28 cellular IoT gateway vendors and 10 module vendors.
- ◆ **Overview** of certifications required for cellular devices.
- ◆ **Price comparisons** between IoT gateway vendors.
- ◆ **Market forecasts** lasting until 2023.

Shipments of cellular IoT gateways to reach 8.6 million by 2023

Berg Insight defines cellular IoT gateways 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 external power supply, no display and at least one input/output port. Trackers, telematics devices and other specialised devices are excluded from this report. Berg Insight has found that 3.2 million IoT gateways and modems were sold globally during 2017 at a total market value of approximately US\$ 785 million. The Americas, Europe and Asia-Pacific regional markets are similar in size in terms of shipments, accounting for about 1 million units each. The ASP on the North American market is significantly higher, primarily due to a higher share of feature-rich 4G LTE devices in the product mix. The market value of the Americas amounted to US\$ 352 million, followed by Europe and the Asia-Pacific, which accounted for US\$ 226 million and US\$ 184 million respectively. Berg Insight forecasts that shipments of cellular IoT gateways will grow at a CAGR of 18.2 percent in the next five years to reach 8.6 million units in 2023.

The IoT gateway vendor landscape is more fragmented than the cellular IoT module market. Berg Insight ranks US-based Cradlepoint as the market leader with an estimated US\$ 115 million in annual revenues from IoT gateway sales. Sierra Wireless is the second largest provider with an estimated US\$ 79 million in annual revenues. Top players further include Cisco, Digi International and Teltonika, which generated an estimated US\$ 70 million, US\$ 65 million and US\$ 52 million respectively from their cellular IoT gateway businesses. The top five vendors held a combined market share of close to 50 percent in 2017. Other notable vendors are CalAmp, MultiTech Systems, Encore Networks and Systech in North America, InHand Networks, Maestro Wireless, Four-Faith, Robustel Technologies and NetComm Wireless in the Asia-Pacific region, and HMS Networks, Advantech B+B SmartWorx, NetModule, Matrix Electrónica, Eurotech, Gemalto, Sagemcom Dr. Neuhaus, Beijer Electronics Group and Option in Europe.

Berg Insight's M2M Research Series

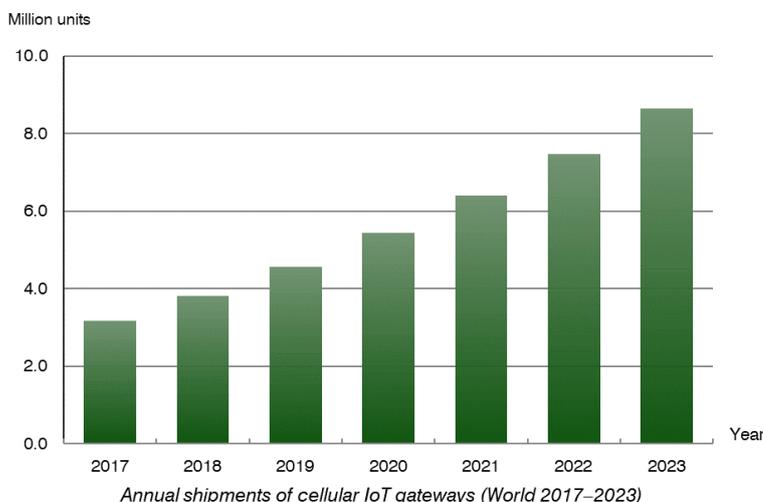
What are the key business opportunities in the emerging wireless M2M/IoT market? Berg Insight's M2M Research Series is a unique series of 35 market reports published on a regular basis. Each title offers detailed analysis of a specific vertical application area such as smart metering, fleet management or car telematics. Once per year we also publish summaries of our research with detailed forecasts for the Global and European wireless M2M markets respectively.

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This report answers the following questions:

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



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The Global Cellular IoT Gateway Market is the foremost source of information about the cellular router, gateway and modem market worldwide. Whether you are a chipset or module vendor, gateway vendor, utility, vehicle manufacturer, telecom operator, investor, consultant, or government agency, you will gain valuable insights from our in-depth research.

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Cellular and LPWA IoT Device Ecosystems
 The Global M2M/IoT Communications Market
 IoT Platforms and Software
 Industrial Automation and Wireless IoT



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