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$ 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.

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

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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.
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?

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**Berg Insight** offers premier business intelligence to the telecom industry. We produce concise reports providing key facts and strategic insights about pivotal developments in our focus areas. Berg Insight also offers detailed market forecast databases and advisory services. Our vision is to be the most valuable source of intelligence for our customers.

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Who should buy this report?
The Global M2M/IoT Terminal Market is the foremost source of information about the cellular router, gateway and modern market worldwide. Whether you are a chipset or module vendor, terminal vendor, utility, vehicle manufacturer, telecom operator, investor, consultant, or government agency, you will gain valuable insights from our in-depth research.

**Related products**

- Wireless IoT Connectivity Technologies and Markets
- Industrial Automation and Wireless IoT
- Fleet Management in the Americas
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**Cellular terminal market forecasts**

- Regional market dynamics
- Market trends
- Decommissioning of 2G networks drives adoption of LTE terminals
- Small and medium-sized vendors offer modular routers and gateways
- M2M terminal vendors focus on complete solutions for vertical markets
- The leading terminal vendors show varying growth rates
- Few M&A activities on the cellular terminal market
- M2M terminal prices vary widely, targeting different market segments
- Few introductions of LTE Cat M and NB-IoT cellular terminals thus far

**Company profiles and strategies**

- M2M/IoT terminal vendors
  - ADLINK Technology
  - Advantech B+B SmartWorx
  - Beijer Electronics Group
  - CalAmp
  - Cisco
  - Cradlepoint
  - Digi International
  - Dr. Neuhaus
  - Encore Networks
  - Eurotech

**Related products**

- Cellular M2M/IoT module vendors
  - Sierra Wireless
  - Telit
  - Gemalto M2M
  - SIMCom
  - u-blox
  - Huawei
  - ZTE WeLink
  - Quectel
  - Fibocom
  - Other cellular module vendors

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