

The Global Cellular IoT Gateway Market



The **Global Cellular IoT Gateway Market** is the fourth 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 130 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 30 cellular IoT gateway vendors and 12 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 8.0 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 more than 3.4 million IoT gateways were sold globally during 2018 at a total market value of approximately US\$ 921 million, up 21 percent from the previous year. The Americas is the largest geographical market, accounting for about US\$ 460 million. The average selling price in the region is significantly higher compared to other markets, primarily due to a higher share of feature-rich 4G LTE devices in the product mix. The market value of the European and Asia-Pacific regions accounted for US\$ 263 million and US\$ 173 million respectively. Berg Insight forecasts that shipments of cellular IoT gateways will grow at a CAGR of 18.5 percent in the next five years to reach 8.0 million units in 2023.

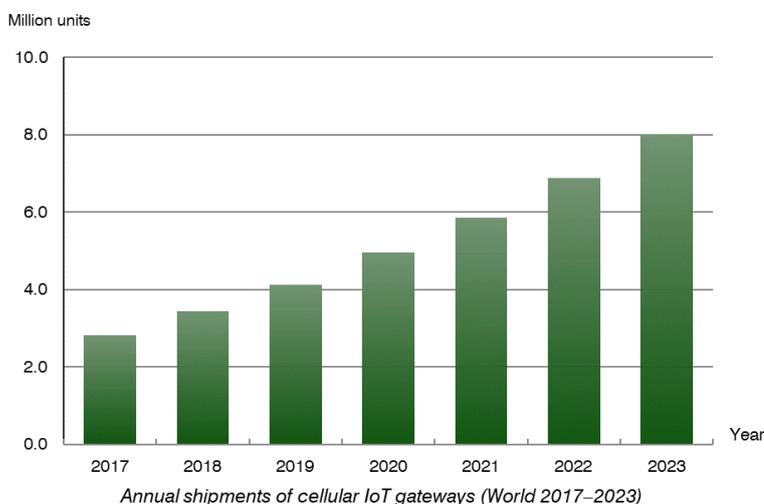
Berg Insight ranks US-based Cradlepoint as the market leader with an estimated US\$ 145 million in annual revenues from IoT gateway sales (adjusted for comparability due to the company's subscription model). Cisco is the second largest provider with an estimated US\$ 118 million in annual revenues. Top players further include Sierra Wireless, CalAmp and Digi International, which generated an estimated US\$ 90 million, US\$ 69 million and US\$ 67 million respectively from the sales of cellular IoT gateways. The top five vendors held a combined market share of about 53 percent. Other vendors with significant presence on the cellular IoT gateway market are Teltonika, InHand Networks, Robustel, HMS Networks and MultiTech Systems. All the top ten cellular IoT gateway vendors shipped more than 100,000 devices in the year. Notable vendors further include Systech, Encore Networks and Lantronix in North America, Moxa, Four-Faith, NetComm and Ursalink in the Asia-Pacific region, and Advantech B+B SmartWorx, Matrix Electrónica, NetModule, Eurotech, Gemalto, Westermo 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 40 market reports published on a regular basis. Each title offers detailed analysis of a specific vertical application area such as smart homes, smart metering, fleet management and car telematics, or covers horizontal topics including IoT platforms, software, hardware, IoT connectivity statistics and the mobile operators' IoT strategies.

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?
- ◆ When will 5G NR modules and IoT gateways be available commercially?



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Who should buy this report?

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.

Related products

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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