



The Global Cellular IoT Gateway Market

6th edition

The Global Cellular IoT Gateway Market analyses the latest developments on the cellular router, gateway and modem market. This strategic research report from Berg Insight provides you with more than 115 pages of unique business intelligence including 5-year industry forecasts and expert commentary on which to base your business decisions.

The cellular IoT gateway market to reach US\$ 2.2 billion in 2026

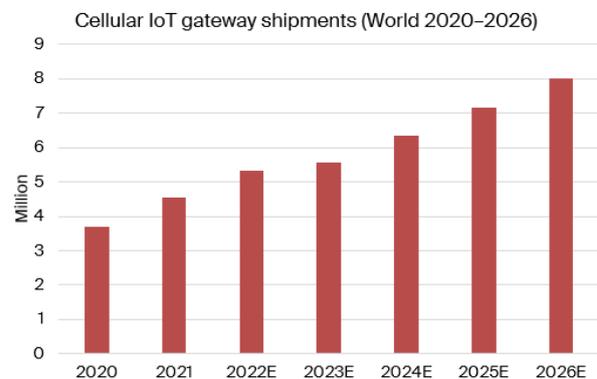
Cellular IoT gateways are standalone devices that provide primary or backup cellular connectivity to devices in a local network. For the purpose of this report, Berg Insight defines cellular IoT gateways as general-purpose cellular routers, gateways and modems that are enclosed in a chassis with external power supply, no display and at least one input/output port. The product category has evolved over the past decades from simple networking devices to aggregation points for devices, implementing advanced functionality for security and edge computing.

The cellular IoT gateway market is driven by the growing need to connect assets and work forces in remote and temporary locations as enterprises digitalise their operations. Annual shipments amounted to 4.5 million units in 2021, generating annual revenues of US\$ 1.1 billion, an increase of 14 percent from the previous year. The Americas is the largest regional market, accounting for about US\$ 582 million. The average selling price in the region is significantly higher compared to other markets, primarily due to a higher share of feature-rich, high-speed 4G LTE and 5G devices in the product mix. The market value of the European and Asia-Pacific regions accounted for US\$ 309 million and US\$ 222 million respectively. Berg Insight forecasts that the market will grow at a CAGR of 13.6 percent in the next five years to reach US\$ 2.2 billion in 2026.

Berg Insight ranks US-based Cradlepoint as the market leader with an estimated US\$ 290 million in annual revenues from IoT gateway sales (adjusted for comparability due to the company's subscription model). Teltonika Networks is the second largest provider with US\$ 95 million in annual revenues. Top players further include Cisco, Sierra Wireless and Digi International, which generated an estimated US\$ 90 million, US\$ 85 million and US\$ 65 million respectively. The top five vendors held a combined market share of about 54 percent.

Other vendors with significant presence on the cellular IoT gateway market are InHand Networks, Peplink, Hongdian, HMS Networks and Robustel. All of the top ten cellular IoT gateway vendors shipped more than 100,000 devices in the year. Notable vendors further include MultiTech, Lantronix, Systech, Casa Systems in North America; Advantech, Four-Faith, Milesight and Moxa in the Asia-Pacific region; and NetModule, Matrix Electrónica, Westermo, RAD, Eurotech, Thales and Option in the EMEA region.

Though many distributed enterprises are already taking advantage of the fast deployment time and ease of use of cellular solutions, Berg Insight believes that the trend will accelerate in the 5G era. As the cost per GB decreases, 5G connectivity will become an increasingly attractive alternative to fixed broadband and over time reach a level in which the monthly fee is comparable to a fixed broadband subscription, thereby expanding the market for cellular routers, gateways and modems.



Highlights from the 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 32 cellular IoT gateway vendors and 15 module vendors.

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Glossary

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 applications are suitable for the cellular IoT gateway form factor?
- How will 5G NR affect the IoT gateway market?
- Which cellular IoT module vendors are also active on this market?
- How will the cellular IoT gateway market evolve over the next five years?



About Berg Insight's IoT market research

Our market reports offer comprehensive information and analysis on key IoT technologies and markets, addressing important concerns including total addressable market, market penetration, market shares, industry landscape, regulatory environment, market trends and forecasts. Our research portfolio today comprises more than 60 items, where each market report focuses on a specific vertical application area or cover horizontal themes. All market reports come with complementary data sets in Excel format that can be easily analysed and converted into tables and charts. We offer a range of different license options together with bundled packages and subscriptions to suit your specific needs.

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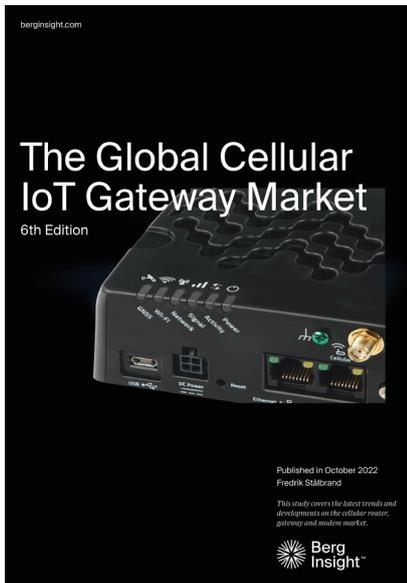
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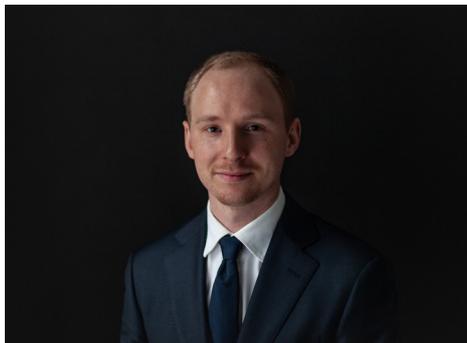


Who should read this report?

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.

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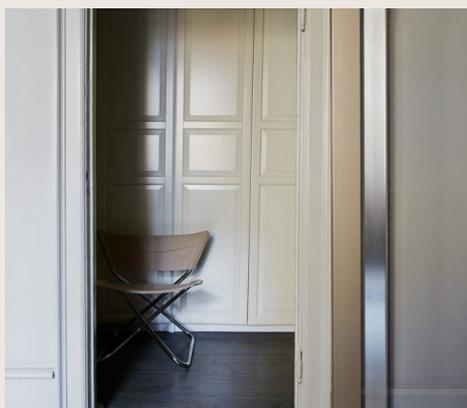


Fredrik is an experienced analyst who specialises in the IoT connectivity and software markets. He contributes primarily to the horizontal research programmes, for which he produces most of the content and manages all the underlying data sets. Fredrik's key areas of expertise are IoT connectivity services, IoT platforms and software as well as IoT/M2M applications in the industrial markets. In addition to published research, he has worked on projects for a range of clients across the IoT ecosystem. Fredrik joined Berg Insight in 2016 and holds a Master's degree in Industrial Engineering and Management from Chalmers University of Technology.

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