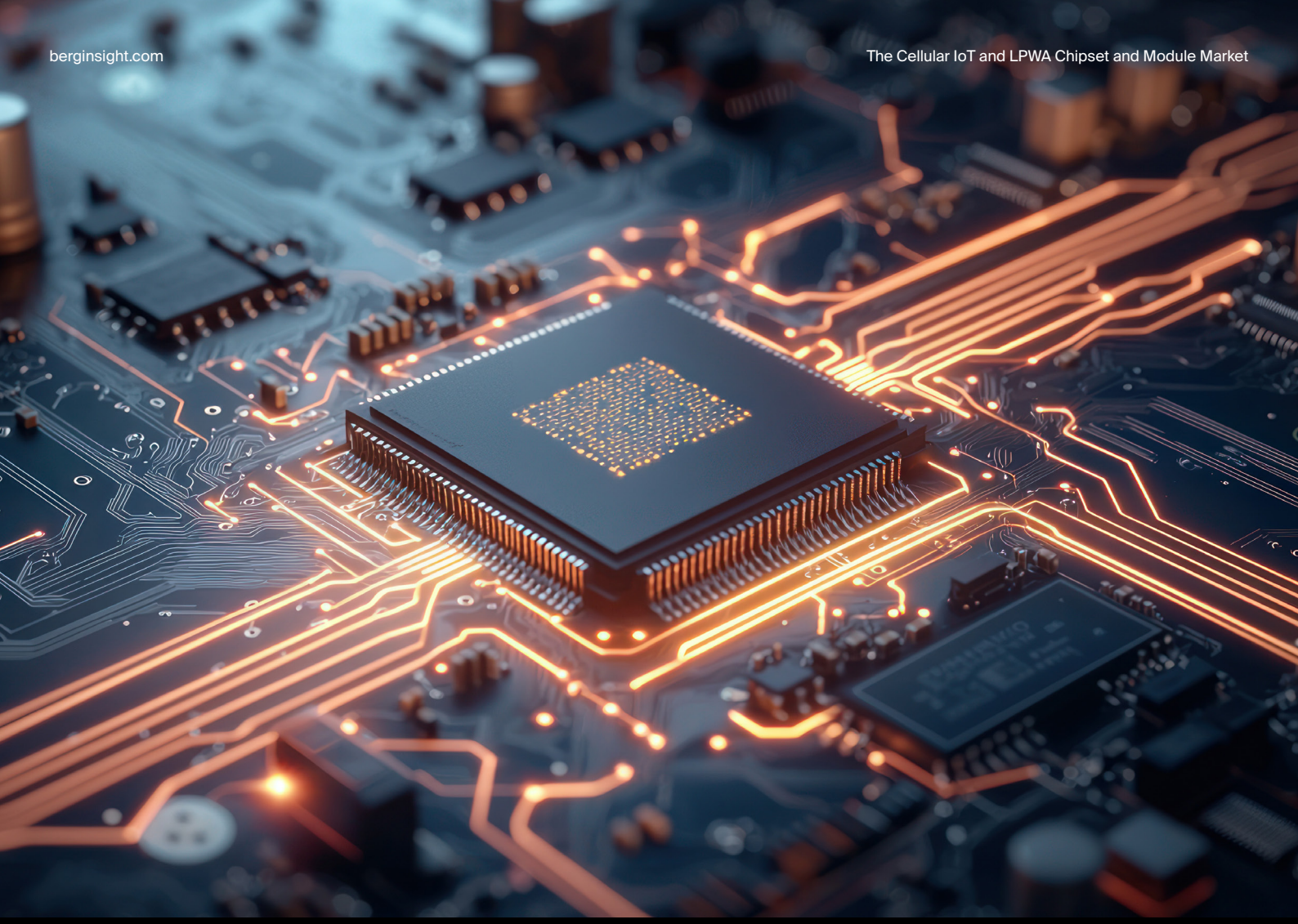


The Cellular IoT and LPWA Chipset and Module Market

10th Edition

The Cellular IoT and LPWA Chipset and Module Market gives a comprehensive overview of the main wide area networking technologies for the Internet of Things – 2G/3G/4G/5G cellular, LoRa, Sigfox as well as a group of emerging LPWA technologies including 802.15.4-based protocols, Wirepas Mesh, DECT-2020 NR and Mioty. This strategic research report from Berg Insight provides you with 150 pages of unique business intelligence including 5-year industry forecasts and expert commentary on which to base your business decisions.

Berg Insight™

Cellular IoT module shipments reached 612 million in 2025

The Internet of Things is continuously evolving and expanding into new domains. By the end of 2025, approximately 4.8 billion devices were connected to wide area networks based on cellular or low-power IoT technologies. The market is highly diverse and divided into multiple ecosystems. This report focuses on the most prominent technology ecosystems for wide area IoT networking – the 3GPP ecosystem of cellular technologies and the LPWA technologies LoRa and Sigfox – as well as a group of other low-power IoT technologies including IEEE 802.15.4-based protocols, Wirepas Mesh, DECT-2020 NR (NR+) and Mioty.

The 3GPP family of cellular technologies supports the largest ecosystem in wide area IoT networking. The cellular IoT chipset and module market can be divided into two main segments with distinct supply chains: general IoT solutions and automotive-grade solutions. Yearly shipments of cellular IoT modules excluding automotive NAD modules amounted to 612 million units in 2025, up 33 percent year-on-year. Annual cellular IoT module revenues grew by 19 percent to US$ 5.6 billion. The five largest cellular module vendors – Quectel, Fibocom, Telit Cinterion, MeiG and China Mobile IoT – held a market share of 73 percent in terms of revenues. The China-based vendors Quectel, China Mobile IoT, Sunsea AIoT, Lierda and Fibocom rank as the volume leaders, benefitting from the massive scale of the domestic market. ZXInfoTek has also rapidly emerged as a prominent vendor with a strong position in the POS terminal segment. ASR Microelectronics, Qualcomm, Eigencomm, UNISOC, Xinyi and MediaTek are the main cellular IoT chipset suppliers. Cellular IoT module shipments are forecasted to grow at a compound annual growth rate (CAGR) of 7.2 percent to reach 976 million units by 2030.

Automotive-grade modules, or NAD modules, are provided by specialised cellular module providers, ODMs and TCU vendors. Quectel is the leading provider of NAD modules with a volume market share of 27 percent, followed by Rolling Wireless with a market share of 13 percent. Other major NAD module vendors include the TCU vendors LG Electronics and Aumovio, as well as Kontron, Favalon (Fibocom), MeiG and Compal. The automotive-grade chipset segment is dominated by Qualcomm, while MediaTek ranks second. NAD module shipments are forecasted to grow at a CAGR of 4.6 percent from 78 million units in 2025 to 98 million units in 2030.

LoRa is gaining momentum as a global connectivity platform for IoT devices. Cumulative shipments of LoRa end nodes reached 500 million at the beginning of 2026. The majority of demand comes from devices deployed in private networks, which remain the dominant deployment model for LoRa networks. The major volume application segments are smart gas and water metering, followed by local area IoT deployments for networking of smart sensors and tracking devices in cities, industrial plants and commercial buildings. Smart home is expected to become a major application area in the coming years, driven by Amazon's Sidewalk network that is expanding beyond the US. Berg Insight estimates that yearly shipments of LoRa devices amounted to 90 million units in 2025. Until 2030, yearly shipments are forecasted to grow at a CAGR of 17.5 percent to reach 202 million units.

Other low-power IoT device ecosystems such as IEEE 802.15.4, Wirepas Mesh, Sigfox, Mioty and NR+ have the potential to grow into significant IoT networking platforms in the coming years. So far, IEEE 802.15.4 has achieved the most widespread adoption. The technology is the most mature in the group and has gained support from several of the leading smart metering vendors. Wirepas Mesh reached an installed base of over 20 million in early 2026 and has been used in a number of large-scale projects. Sigfox had an installed base of 15 million at year-end 2025. The Singapore-based Sigfox operator UnaBiz took over as the new owner of Sigfox in 2022, setting a new direction for the Sigfox technology and operating model for the business. Berg Insight believes that the critical test for Sigfox will be how the technology is received in the asset tracking segment. Mioty has in the last few years started to gain traction within smart water metering and has reached an installed base of over 1 million. DECT-2020 NR (NR+) is at an even earlier stage of development, with deployments still primarily limited to pilot projects and early commercial implementations.

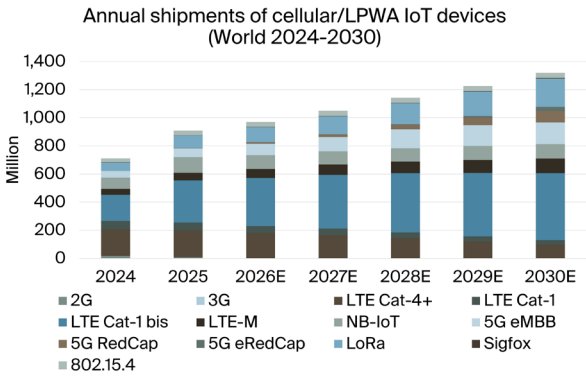


Table of contents

Highlights from the report

360-degree overview of the main IoT wide area networking ecosystems.

Cellular IoT chipset and module data by region, vertical, device type and technology from 2018–2030.

Market shares for cellular IoT chipset and module vendors.

Comparison of technologies and standards.

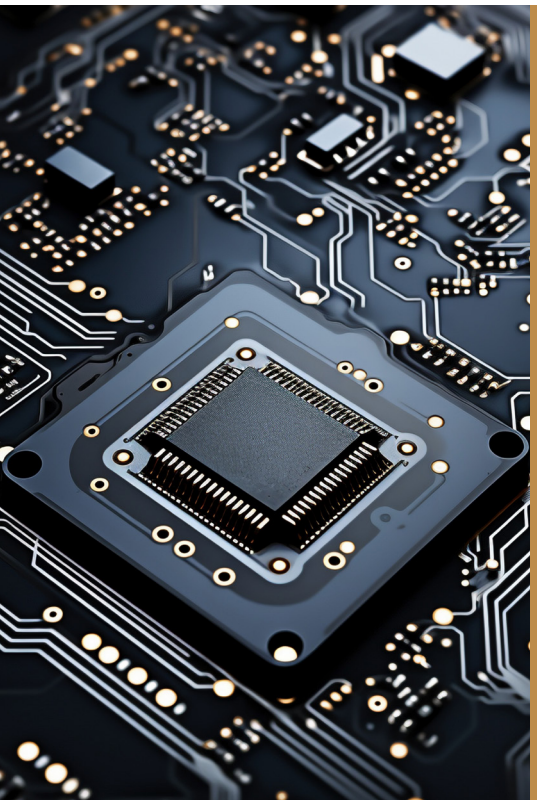
Updated profiles of the main suppliers of IoT chipsets and modules.

Adoption trends for 5G technologies including 5G eMBB, 5G RedCap and 5G eRedCap, as well as LPWA technologies including NB-IoT, LTE-M, LoRa and Sigfox.

Cellular and non-3GPP LPWA IoT device market forecasts until 2030.

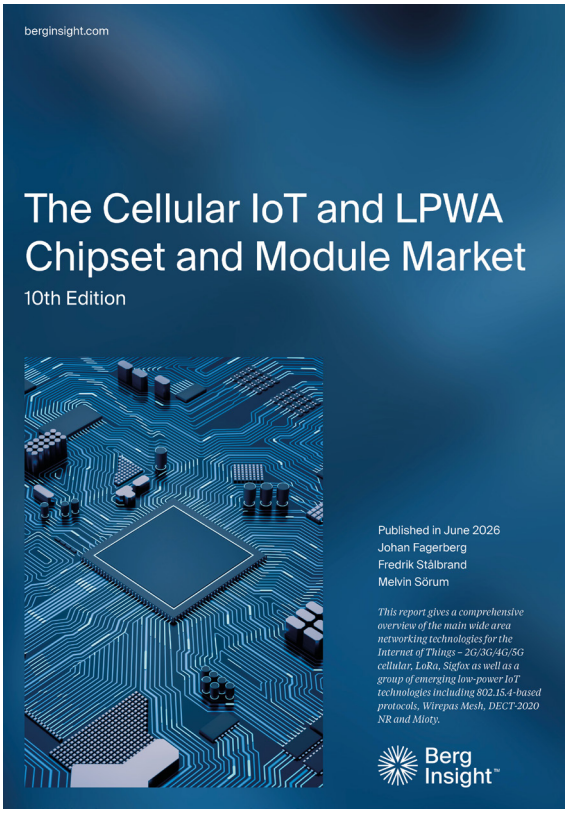
This report answers the following questions

- How will the IoT wide area networking technology market evolve over the next five years?
- Who are the new challengers in the cellular IoT module market?
- Who are the largest cellular IoT chipset and module vendors for each technology?
- What are the market trends in the key regional markets?
- Which IoT device types will drive the adoption of 5G RedCap and eRedCap modules?
- What is the current installed base of LoRa and Sigfox devices?
- What are the prospects for LPWA technology standards?



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 85 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.



HORIZONTAL THEMES

The Cellular IoT and LPWA Chipset and Module Market

Global demand for IoT wide area networking technology is in a growth phase. Berg Insight forecasts that annual shipments of cellular and non-3GPP LPWA IoT modules will grow at a compound annual growth rate (CAGR) of 7.7 percent from 909 million units in 2025 to 1,32 billion units in 2030. Get up to date with the latest trends from all vertical markets with this unique 150-page report and database covering cellular IoT chipset and module shipments across 30+ device types, 10 technologies and 6 regional markets.

PUBLISHED DATE	June 2026
EDITION	10th
PAGES	150
AUTHOR	Johan Fagerberg, Fredrik Stålbrand and Melvin Sörum

PDF & EXCEL: 1 user license	€ 1 800
PDF & EXCEL: 2–10 user license	€ 2 700
PDF & EXCEL: Enterprise license	€ 3 600

Read more and place order on berginsight.com

Who should read this report?

The Cellular IoT and LPWA Chipset and Module Market is the foremost source of information about all the major wide area networking technologies for the Internet of Things. Whether you are a chipset or module vendor, software vendor, utility, vehicle manufacturer, telecom operator, investor, consultant, or government agency, you will gain valuable insights from our in-depth research.

AUTHORS

Johan Fagerberg, Fredrik Stålbrand & Melvin Sörum

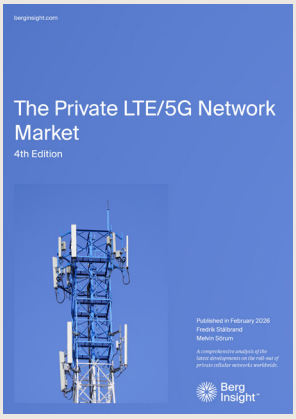
Johan Fagerberg is co-founder and an experienced analyst with a Master's degree in Electrical Engineering from Chalmers University of Technology. He has during the past 22 years published numerous articles and reports about various IoT topics.

Fredrik Stålbrand is a Principal Analyst with a Master's degree in Industrial Engineering and Management from Chalmers University of Technology. He joined Berg Insight in 2016 and his areas of expertise include IoT hardware, connectivity and software.

Melvin Sörum is an IoT analyst who specialises in the IoT connectivity and software markets. Melvin holds a Master's degree in Industrial Engineering and Management from Chalmers University of Technology and joined Berg Insight in 2024.

Related products *Find them and more on berginsight.com*

4th Edition

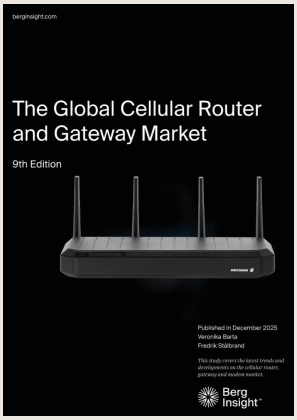


CATEGORY
Horizontal Themes

10th Edition

CATEGORY
Horizontal Themes

9th Edition



CATEGORY
Horizontal Themes

CONTACT

Berg Insight AB
Viktoriagatan 3
411 25 Gothenburg
Sweden

+46 (0)31 711 30 91
info@berginsight.com
www.berginsight.com

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.