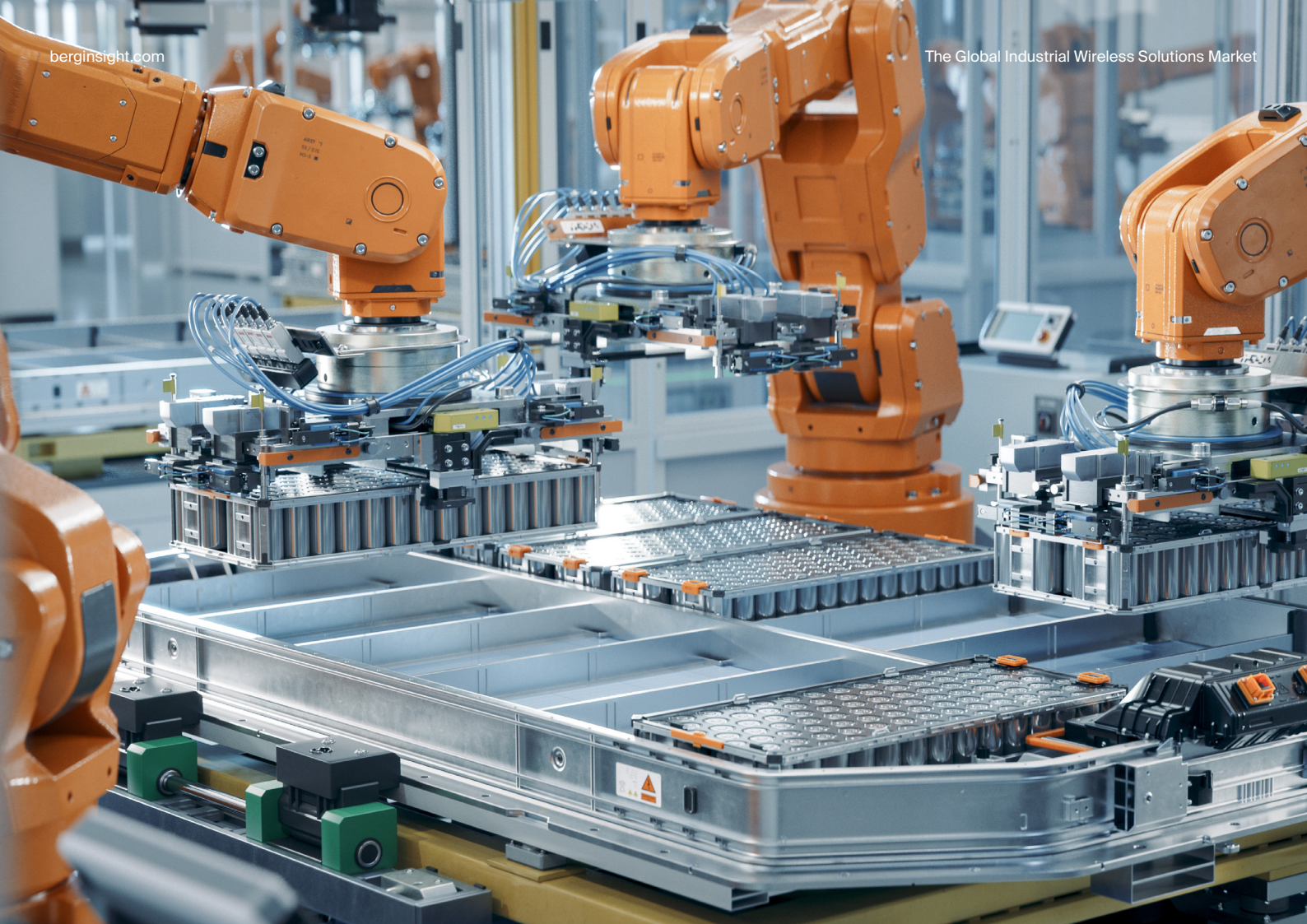




The Global Industrial Wireless Solutions Market

6th Edition

The Global Industrial Wireless Solutions Market is the sixth consecutive report from Berg Insight analysing the latest developments on the market for wireless applications in industrial automation worldwide. This strategic research report from Berg Insight provides you with 180 pages of unique business intelligence, including 5-year industry forecasts, expert commentary and real-life case studies on which to base your business decisions.



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Shipments of wireless devices in industrial automation to reach 8.5 million by 2030

Industrial communications systems form the backbone of modern automation architectures, facilitating real-time monitoring, control and optimisation of industrial processes. While many of the early fieldbus technologies remain in operation today, the market has increasingly shifted towards Industrial Ethernet-based networking solutions capable of supporting higher bandwidths, greater scalability and integration with enterprise IT systems. Although wired networking solutions are still predominantly used for industrial communications between sensors, controllers and systems, wireless solutions are widely used as wire replacements in hard-to-reach or hazardous areas, on moving machine parts and on portable equipment. Standardised technologies such as Wi-Fi, IEEE 802.15.4 and Bluetooth have advanced to become the leading wireless technologies for industrial applications.

Wireless technologies are integrated into a wide range of devices that can be used throughout an automation system. The devices can be broadly divided into two segments: automation equipment and network equipment. In the automation equipment segment, high-volume product categories featuring wireless communication capabilities include instrumentation such as industrial sensors. Important product categories within the network equipment segment are access points, gateways, routers and switches. Berg Insight estimates that annual shipments of wireless devices for industrial automation applications including both network and automation equipment reached 5.8 million units worldwide in 2025, accounting for approximately 6 percent of all new connected nodes. Growing at a compound annual growth rate (CAGR) of 8.1 percent, annual shipments are expected to reach 8.5 million in 2030. The installed base of wireless devices in industrial automation applications is forecasted to grow from an estimated 56.6 million connections at the end of 2025 to 74.0 million connected devices by 2030.

Multiple large automation vendors now provide industrial network equipment including wireless solutions. Siemens is one of the few vendors that offer networking solutions for all levels of an automation system with a broad industrial wireless portfolio and an increasing focus on WLAN and 5G solutions. Several companies with a strong position in the process automation market offer wireless field devices based on WirelessHART and ISA100.11a. Emerson became the first company to market WirelessHART products in 2008 and has today an installed base of over 12 million wireless pressure transmitters worldwide. Other major industrial automation vendors that provide wireless field devices include ABB, Honeywell Technologies, OMRON, Rockwell Automation, Schneider Electric and Yokogawa.

Instrumentation for industrial automation is particularly important in process industries where continuous monitoring and precise control of process variables are essential. Field instruments are also used in factory automation applications

such as machine and condition monitoring, quality control and production automation. Suppliers of industrial wireless sensing solutions for primarily factory automation include Balluff, Banner Engineering, ifm electronic, SICK and Turck. Endress+Hauser, KROHNE and VEGA offer wireless instrumentation and measurement solutions for process industries, while Pepperl+Fuchs supplies both factory and process automation solutions.

Major providers of wired industrial network equipment also offer wireless solutions to enable customers to monitor and control devices wirelessly in parts of the plant that are normally not connected to the control room due to accessibility or wiring costs. These include Siemens, Cisco, Belden, Moxa and Phoenix Contact, all of which offer industrial wireless devices such as routers, gateways and access points, along with their wired solutions. Cellular devices are typically used for data acquisition and backhaul communications in distributed automation applications. The largest providers of cellular IoT gateways and routers in the industrial space include Teltonika Networks, Cisco, Moxa, Siemens, HMS Networks, Phoenix Contact, Advantech, Robustel, Digi International and InHand Networks. In addition to the leading industrial WLAN solution suppliers Cisco, Belden, Siemens and Moxa, other providers of WLAN devices include Phoenix Contact, Westermo (Ependion), Advantech, HMS Networks and ACKSYS (part of iXnov Group).

As manufacturers deploy more sensors, connected machinery and digitalisation initiatives, industrial PCs become increasingly important for collecting, processing and analysing operational data. Many automation vendors now position industrial PCs as part of broader control and edge computing ecosystems rather than as standalone hardware products. Suppliers of industrial computing with a global scale include Advantech, Siemens and Beckhoff Automation. Additional vendors of industrial control solutions and embedded computing include ADLINK Technology, AAEON, IEI Integration, Kontron, Nexcom, OnLogic, Wago and Weidmüller.

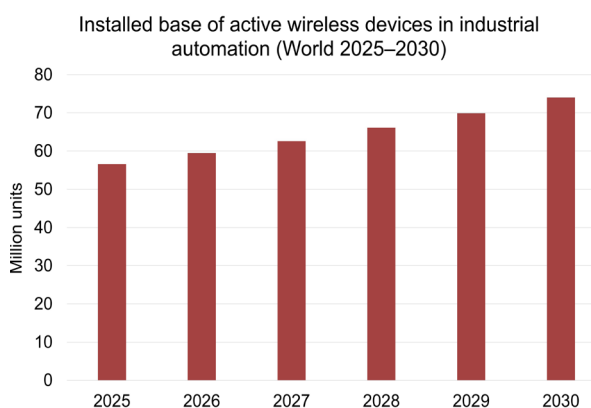


Table of contents

Executive Summary

1 The Industrial Automation Industry

- 1.1 Introduction to industrial automation
- 1.2 Factory and process automation
- 1.3 Factory and process operations
- 1.4 Industrial automation architecture overview
- 1.5 Industrial automation market segments
 - 1.5.1 Automation equipment and instrumentation
 - 1.5.2 Industrial robots
 - 1.5.3 Industrial control systems
 - 1.5.4 Industrial software
- 1.6 Industrial automation evolution

2 Industrial Wireless Networking and Communications

- 2.1 Industrial communications infrastructure
 - 2.1.1 Field segment
 - 2.1.2 Control segment
 - 2.1.3 Network segment
 - 2.1.4 Backoffice segment
- 2.2 Operations management
 - 2.2.1 Production and process management
 - 2.2.2 Business management
- 2.3 Equipment management and regulatory compliance
 - 2.3.1 Equipment diagnostics and maintenance planning
 - 2.3.2 Security and safety
 - 2.3.3 Regulatory compliance
- 2.4 Business models and project strategies

3 Market Analysis

- 3.1 Industrial automation market value
- 3.2 Market leading vendors
 - 3.2.1 Automation equipment and instrumentation vendors
 - 3.2.2 Industrial control systems vendors
 - 3.2.3 Industrial networking equipment vendors
- 3.3 Market forecasts
 - 3.3.1 Installed base and unit shipments
 - 3.3.2 Wireless technologies
 - 3.3.3 Regional markets
- 3.4 Market drivers and barriers
 - 3.4.1 Macroeconomic environment
 - 3.4.2 Regulatory environment
 - 3.4.3 Competitive environment
 - 3.4.4 Technology environment
- 3.5 Value chain analysis
 - 3.5.1 Industrial automation industry players
 - 3.5.2 Industrial communications and control industry players
 - 3.5.3 IoT platform and IT industry players
- 3.6 Market trends
 - 3.6.1 Partnerships continue to be an integral part of business strategies
 - 3.6.2 AI set to optimise industrial operations
 - 3.6.3 Expansion of wireless capabilities in modular devices enables flexibility
 - 3.6.4 The maturing landscape of private LTE/5G networks at industrial site

- 3.6.5 Adoption of LPWAN technologies is increasing in process industries
- 3.6.6 Cybersecurity at the top of the agenda

4 Global Automation Vendors

- 4.1 ABB
- 4.2 Bosch
- 4.3 Emerson
- 4.4 FANUC
- 4.5 Honeywell Technologies
- 4.6 KUKA
- 4.7 Mitsubishi Electric
- 4.8 OMRON
- 4.9 Rockwell Automation
- 4.10 Schneider Electric
- 4.11 Siemens
- 4.12 Yaskawa Electric
- 4.13 Yokogawa

5 Industrial Device Vendors

- 5.1 Industrial sensing solution vendors
 - 5.1.1 Balluff
 - 5.1.2 Banner Engineering
 - 5.1.3 Endress+Hauser
 - 5.1.4 ifm electronic
 - 5.1.5 Keyence
 - 5.1.6 KROHNE
 - 5.1.7 Pepperl+Fuchs
 - 5.1.8 SICK
 - 5.1.9 steute Technologies
 - 5.1.10 Turck
 - 5.1.11 VEGA
- 5.2 Industrial control solution and embedded computing vendors
 - 5.2.1 AAEON Technology
 - 5.2.2 ADLINK Technology
 - 5.2.3 Advantech
 - 5.2.4 Axiomtek
 - 5.2.5 Beckhoff Automation
 - 5.2.6 Contec (Daifuku)
 - 5.2.7 IEI Integration
 - 5.2.8 Kontron
 - 5.2.9 Nexcom
 - 5.2.10 OnLogic
 - 5.2.11 Phoenix Contact
 - 5.2.12 Wago
 - 5.2.13 Weidmüller
- 5.3 Industrial wireless networking vendors
 - 5.3.1 BEC Technologies (Billion Electric)
 - 5.3.2 Belden
 - 5.3.3 Cisco
 - 5.3.4 Digi International
 - 5.3.5 Ependion
 - 5.3.6 Eurotech
 - 5.3.7 Four-Faith Communication Technology
 - 5.3.8 HMS Networks
 - 5.3.9 Hongdian
 - 5.3.10 InHand Networks
 - 5.3.11 INSYS icom
 - 5.3.12 iXnov Group
 - 5.3.13 IXON
 - 5.3.14 Moxa
 - 5.3.15 MultiTech

- 5.3.16 Nokia
- 5.3.17 ORing Industrial Networking
- 5.3.18 RAD
- 5.3.19 Robustel
- 5.3.20 Secomea
- 5.3.21 Semtech
- 5.3.22 Teltonika Networks
- 5.3.23 Welotec (Westermo)

Glossary

Highlights from the report

360-degree overview of the IoT ecosystem in the industrial automation industry.

Insights from 30 new executive interviews with market leading companies.

Comprehensive overview of the value chain and key applications.

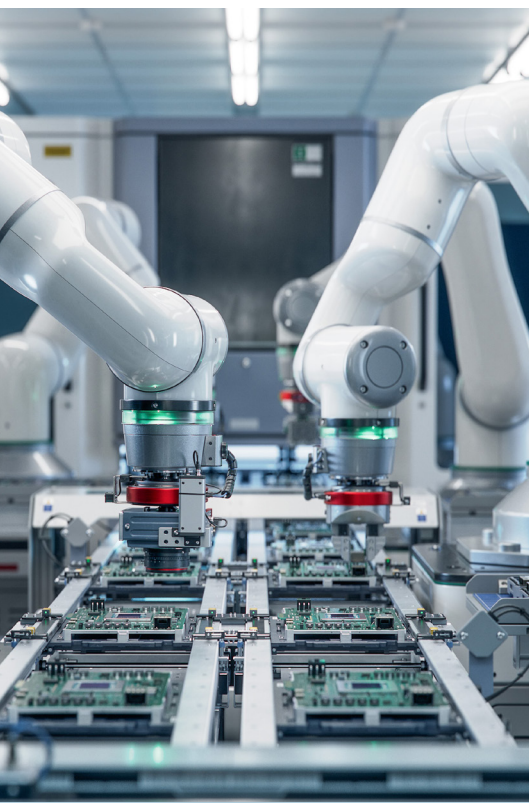
In-depth analysis of market trends and key developments.

Detailed profiles of 60 key players in this market.

Updated market forecasts by technology, region and equipment category lasting until 2030.

The report answers the following questions

- What are the key drivers behind the adoption of wireless IoT in industrial automation?
- Which are the leading wireless IoT solution providers for industrial automation applications?
- What offerings are available from device vendors and service providers?
- Which trends and developments are shaping the industrial automation market?
- Which are the leading wireless technologies and Industrial Ethernet protocols today?
- How will the market evolve in Europe, North America and Asia-Pacific?
- What are the recent merger and acquisition activities in this market?
- How will connectivity strategies in industrial automation evolve in the future?



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.



INDUSTRIAL IOT

The Global Industrial Wireless Solutions Market

This study investigates the worldwide market for wireless IoT applications in industrial automation. The installed base of active wireless IoT devices in the industrial automation industry is forecasted to grow at a compound annual growth rate of 5.5 percent from 56.5 million units at the end of 2023 to 74.0 million units by 2030. Get up to date with the latest information about vendors, products and markets.

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Who should read this report?

The **Global Industrial Wireless Solutions Market** is the foremost source of information about the adoption of wireless connectivity in the industrial automation sector. Whether you are a solution provider, device vendor, industrial automation player, telecom operator, investor, consultant, or government agency, you will gain valuable insights from our in-depth research.

AUTHORS

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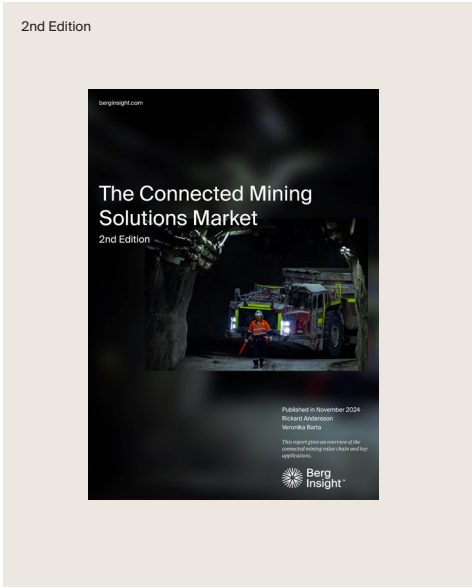
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