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Global IoT in Manufacturing Market Size Study & Forecast, by Deployment (Cloud-based and On-premises), by Infrastructure Type (Mutable Infrastructure and Immutable Infrastructure), by Approach (Imperative and Declarative), by End-user (BFSI, Retail, Government, Manufacturing, IT & Telecom, Healthcare, and Others) and Regional Forecasts 2025-2035

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Abstracts

The Global IoT in Manufacturing Market is valued at approximately USD 0.75 billion in 2024 and is projected to grow at a CAGR of more than 20.30% over the forecast period 2025-2035. The Internet of Things (IoT) in manufacturing refers to the integration of smart sensors, connected devices, and intelligent platforms that transform conventional manufacturing setups into highly automated and data-driven environments. By embedding connectivity into machines, factories achieve real-time monitoring, predictive maintenance, production optimization, and operational safety enhancements. IoT technologies in manufacturing are being embraced as companies pursue greater efficiency, sustainability, and resilience in supply chains. The market expansion is propelled by rapid digital transformation across industries, heightened demand for data-driven insights, and the growing emphasis on Industry 4.0. Furthermore, the convergence of AI, machine learning, and IoT platforms has further amplified adoption, creating scalable opportunities for manufacturers worldwide.

The surge in smart factory adoption and the proliferation of connected devices have substantially accelerated demand for IoT in manufacturing. With global enterprises investing in digital twins, automation, and advanced analytics, IoT solutions are moving

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from experimental deployments to enterprise-wide integration. According to industry reports, the number of IoT-connected devices worldwide is expected to surpass 29 billion by 2030, with a significant share attributed to industrial applications. In addition, government-backed initiatives promoting smart infrastructure, combined with the cost benefits of predictive maintenance and downtime reduction, are persuading industries to deploy IoT solutions more aggressively. However, challenges such as cybersecurity risks, high upfront investment, and integration complexity across legacy systems could restrain market growth during the forecast timeline.

The detailed segments and sub-segments included in the report are:

By Deployment:

Cloud-based

On-premises

By Infrastructure Type:

Mutable Infrastructure

Immutable Infrastructure

By Approach:

Imperative

Declarative

By End-user:

BFSI

Retail

Government

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Manufacturing

IT & Telecom

Healthcare

Others

On-premises Deployment is Expected to Dominate the Market

On-premises deployment continues to command a substantial share in the IoT in manufacturing market, primarily due to its ability to offer high levels of security, customized configurations, and seamless control over enterprise-wide data. Large-scale manufacturers, particularly those in heavily regulated industries, favor on-premises systems to maintain compliance and ensure sensitive operational data remains within controlled environments. While cloud adoption is expanding quickly, on-premises remains deeply entrenched among enterprises requiring high reliability and minimal latency in mission-critical operations. Over the forecast horizon, hybrid approaches may emerge, but on-premises solutions are expected to retain a dominant market share.

Cloud-based Infrastructure Leads in Revenue Contribution

When segmented by infrastructure type, mutable infrastructure contributes significantly to market revenues as organizations increasingly pivot towards adaptive and flexible architectures that accommodate evolving workloads. Mutable systems enable rapid scaling, software-defined operations, and agile manufacturing processes—making them highly attractive in a digital-first manufacturing landscape. In contrast, immutable infrastructure, while offering greater resilience and lower risks of system compromise, lags in adoption due to the rigidity it imposes. As a result, mutable infrastructure currently leads in terms of revenue generation, with demand driven by industries prioritizing adaptability and accelerated innovation cycles.

The key regions considered for the Global IoT in Manufacturing Market study include North America, Europe, Asia Pacific, Latin America, and the Middle East & Africa. North America held the largest share in 2025, underpinned by the presence of advanced manufacturing hubs, widespread deployment of smart factory initiatives, and substantial investments in automation technologies. Europe continues to see robust growth fueled

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by Industry 4.0 initiatives, stringent sustainability regulations, and government-backed digitization strategies. Asia Pacific, however, is forecasted to be the fastest-growing region, driven by China, India, and Japan’s rapid industrial expansion, strong manufacturing output, and government-led innovation in industrial IoT ecosystems. Meanwhile, Latin America and the Middle East are gradually embracing IoT as multinational corporations expand their manufacturing footprints in these regions.

Major market players included in this report are:

Siemens AG

Cisco Systems, Inc.

IBM Corporation

Microsoft Corporation

PTC Inc.

GE Digital

Rockwell Automation, Inc.

SAP SE

Bosch Connected Industry

Honeywell International Inc.

Hitachi, Ltd.

Oracle Corporation

Intel Corporation

Schneider Electric SE

ABB Ltd.

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Global IoT in Manufacturing Market Report Scope:

Historical Data – 2023, 2024

Base Year for Estimation – 2024

Forecast period - 2025-2035

Report Coverage - Revenue forecast, Company Ranking, Competitive Landscape, Growth factors, and Trends

Regional Scope - North America; Europe; Asia Pacific; Latin America; Middle East & Africa

Customization Scope - Free report customization (equivalent to up to 8 analysts' working hours) with purchase. Addition or alteration to country, regional & segment scope*

The objective of the study is to define market sizes of different segments & countries in recent years and to forecast the values for the coming years. The report is designed to incorporate both qualitative and quantitative aspects of the industry within the countries involved in the study. The report also provides detailed information about crucial aspects, such as driving factors and challenges, which will define the future growth of the market. Additionally, it incorporates potential opportunities in micro-markets for stakeholders to invest, along with a detailed analysis of the competitive landscape and product offerings of key players. The detailed segments and sub-segments of the market are explained below:

Key Takeaways:

Market Estimates & Forecast for 10 years from 2025 to 2035.

Annualized revenues and regional-level analysis for each market segment.

Detailed analysis of the geographical landscape with country-level analysis of major regions.

Competitive landscape with information on major players in the market.

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Analysis of key business strategies and recommendations on future market approach.

Analysis of the competitive structure of the market.

Demand side and supply side analysis of the market.

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CHAPTER 10. COMPETITIVE INTELLIGENCE

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