

# Global Decentralized Physical Infrastructure Network (DePIN) Solutions Supply, Demand and Key Producers, 2026-2032

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## Abstracts

The global Decentralized Physical Infrastructure Network (DePIN) Solutions market size is expected to reach \$ 5265 million by 2032, rising at a market growth of 31.1% CAGR during the forecast period (2026-2032).

Decentralized Physical Infrastructure Network (DePIN) solutions refer to a class of blockchain-enabled infrastructure products, protocols and operating platforms that coordinate the deployment, operation and monetisation of real-world or hardware-linked resources through distributed ledgers, token incentives, verifiable device identities, edge nodes and community-owned contribution mechanisms.

The research scope focuses on solution providers that can connect physical or quasi-physical assets—such as wireless hotspots, sensors, cameras, vehicle telematics devices, weather stations, GNSS / RTK base stations, GPU and CPU compute capacity, storage nodes, bandwidth resources and energy assets—into a verifiable network and deliver usable infrastructure services to enterprises, developers, public-sector users or end customers. Major product forms include decentralized wireless networks, decentralized GPU and cloud computing networks, decentralized storage networks, mapping and vehicle-data networks, weather and environmental sensing networks, positioning and location-proof networks, energy-data and energy-trading networks, and DePIN-specific middleware for device identity, data verification and developer integration.

Commercial models usually include dedicated hardware node sales, network usage fees, API fees, data licensing, compute / storage / bandwidth rental, enterprise deployment and ecosystem service fees. Typical hardware endpoints range from low

hundreds of US dollars to above one thousand US dollars, depending on device type, connectivity, sensing capability and network role.

Based on our research, DePIN solutions should not be viewed as a single Web3 application category, nor as a simple repackaging of conventional IoT, telecommunications or cloud infrastructure. The sector is better understood as a new infrastructure coordination model built around real hardware resources, decentralized network formation, verifiable contribution and economic incentives. Unlike traditional infrastructure, where capital expenditure and operations are concentrated in a small number of operators, DePIN networks rely on distributed contributors to provide wireless coverage, compute, storage, bandwidth, geospatial data, vehicle data, weather data, energy data and other hardware-linked resources. The protocol and platform layers then provide device verification, resource orchestration, metering, settlement and reward distribution. For this reason, this report adopts a narrow market definition and includes only projects and companies that provide real network services, device-node supply, data products or DePIN-specific infrastructure. Generic Web3 platforms, exchanges, data portals, investors and purely speculative token issuers are excluded from the core revenue model. This conservative scope is materially smaller than broad token-market or concept-sector metrics, but it better reflects real industrial revenue and commercial adoption.

From a global supply perspective, the DePIN market is currently structured around North American leadership in core protocols and flagship networks, European strength in energy and data infrastructure, Asian involvement in hardware and selected protocol supply, and regional experimentation in emerging markets. North America has a clear first-mover position in decentralized wireless, storage, GPU compute, vehicle data and mapping networks, with projects such as Helium, Filecoin, Akash, Render, DIMO and Hivemapper shaping the sector's reference architecture. Europe has a stronger presence in energy data, real-time data networks, distributed computing, weather, noise intelligence and aviation data. China and Hong Kong appear more relevant as hardware and IoT supply-chain participants, particularly in LoRaWAN gateways, Helium-compatible equipment, smart sensors and selected decentralized storage projects, rather than as large-scale domestic token-incentivized networks. Singapore and other Asian hubs are increasingly visible in GPU cloud, RTK positioning and energy-data networks.

Demand growth through 2032 is expected to come primarily from AI compute shortages, cloud cost optimization, wireless offload, autonomous systems positioning, urban mapping, vehicle data, hyperlocal weather, environmental sensing and distributed

energy management. Decentralized GPU and AI inference networks are likely to show the highest growth elasticity because enterprise users are actively searching for lower-cost, flexible and geographically distributed compute capacity. Mapping, vehicle, weather, RTK and noise-data networks will grow more selectively, depending on coverage density, data quality, enterprise procurement and regulatory permission. Wireless and WiFi-based DePIN networks are best understood as complementary infrastructure rather than full replacements for traditional telecom networks. Their future adoption depends on operator partnerships, spectrum rules, hotspot economics and end-user experience. In practical terms, DePIN's strongest opportunity lies in long-tail infrastructure gaps where traditional centralized infrastructure is too expensive, too slow to deploy or insufficiently granular.

From a product and technology standpoint, DePIN is moving away from an early "hardware-mining" model toward a more sustainable combination of verifiable data, paying customers, enterprise APIs and machine-economy applications. Early projects often relied on hardware sales and token rewards to accelerate network deployment, but this created risks around oversupplied nodes, weak demand and token-market cyclicity. The next generation of projects is increasingly focused on device identity, anti-fraud mechanisms, data quality, service-level reliability, enterprise integration and compliance. Infrastructure-layer providers such as IoTeX, Peaq, Streamr, Pocket Network and Fluence are important because they reduce the development burden for DePIN builders by offering device onboarding, data verification, decentralized messaging, RPC infrastructure and compute orchestration. At the same time, technologies such as OpenRoaming, CBRS, LoRaWAN, GNSS RTK, OBD-II, dashcam-based AI mapping and GPU orchestration are translating DePIN from a conceptual sector into specific industrial workflows.

Looking ahead, the sector will be shaped by crypto-asset regulation, data privacy, wireless spectrum rules, cybersecurity requirements, energy-market regulation and cross-border data governance. The implementation of MiCA in the European Union and the gradual clarification of U.S. crypto policy may improve regulatory visibility, but they will also increase compliance requirements for token issuance, node incentives and network operations. Competition will therefore shift from token valuation toward real coverage, node quality, enterprise adoption, data usability, cost advantage and compliance capability. By 2032, the most resilient DePIN companies are likely to be those that can close the loop between token incentives, hardware supply and genuine commercial demand. Projects that rely mainly on subsidy-driven participation, lack data-quality controls or fail to convert network activity into paying demand are likely to be consolidated, repositioned or phased out.

This report studies the global Decentralized Physical Infrastructure Network (DePIN) Solutions demand, key companies, and key regions.

This report is a detailed and comprehensive analysis of the world market for Decentralized Physical Infrastructure Network (DePIN) Solutions, and provides market size (US\$ million) and Year-over-Year (YoY) growth, considering 2025 as the base year. This report explores demand trends and competition, as well as details the characteristics of Decentralized Physical Infrastructure Network (DePIN) Solutions that contribute to its increasing demand across many markets.

Highlights and key features of the study

Global Decentralized Physical Infrastructure Network (DePIN) Solutions total market, 2021-2032, (USD Million)

Global Decentralized Physical Infrastructure Network (DePIN) Solutions total market by region & country, CAGR, 2021-2032, (USD Million)

U.S. VS China: Decentralized Physical Infrastructure Network (DePIN) Solutions total market, key domestic companies, and share, (USD Million)

Global Decentralized Physical Infrastructure Network (DePIN) Solutions revenue by player, revenue and market share 2021-2026, (USD Million)

Global Decentralized Physical Infrastructure Network (DePIN) Solutions total market by Resource Type, CAGR, 2021-2032, (USD Million)

Global Decentralized Physical Infrastructure Network (DePIN) Solutions total market by Application, CAGR, 2021-2032, (USD Million)

This report profiles major players in the global Decentralized Physical Infrastructure Network (DePIN) Solutions market based on the following parameters - company overview, revenue, gross margin, product portfolio, geographical presence, and key developments. Key companies covered as a part of this study include Helium Foundation, Protocol Labs, Akash Network, Render Network Foundation, Aethir, io.net, Livepeer, Theta Labs, Storj Labs, Sia Foundation, etc.

This report also provides key insights about market drivers, restraints, opportunities, new product launches or approvals.

Stakeholders would have ease in decision-making through various strategy matrices used in analyzing the world Decentralized Physical Infrastructure Network (DePIN) Solutions market

### Detailed Segmentation:

Each section contains quantitative market data including market by value (US\$ Millions), by player, by regions, by Resource Type, and by Application. Data is given for the years 2021-2032 by year with 2025 as the base year, 2026 as the estimate year, and 2027-2032 as the forecast year.

### Global Decentralized Physical Infrastructure Network (DePIN) Solutions Market, By Region:

United States

China

Europe

Japan

South Korea

ASEAN

India

Rest of World

### Global Decentralized Physical Infrastructure Network (DePIN) Solutions Market, Segmentation by Resource Type:

Compute Resource Networks

Storage Resource Networks

Connectivity Resource Networks

Data / Sensor Resource Networks

Other

Global Decentralized Physical Infrastructure Network (DePIN) Solutions Market,  
Segmentation by Product Form:

Protocol / Network Layer

Platform / API Layer

Hardware Node Layer

Middleware / Developer Tools

Global Decentralized Physical Infrastructure Network (DePIN) Solutions Market,  
Segmentation by Customer Type:

Enterprise Users

Developers and Web3 Applications

Infrastructure Contributors

Public Sector / Research Users

Other

Global Decentralized Physical Infrastructure Network (DePIN) Solutions Market,  
Segmentation by Business Model:

Hardware Sales

Usage-based Service Fees

Data Licensing

Enterprise Deployment / SaaS

## Global Decentralized Physical Infrastructure Network (DePIN) Solutions Market, Segmentation by Application:

AI and Cloud Workloads

Mobility and Geospatial Intelligence

Wireless and Internet Access

Energy and Environmental Data

Other

## Companies Profiled:

Helium Foundation

Protocol Labs

Akash Network

Render Network Foundation

Aethir

io.net

Livepeer

Theta Labs

Storj Labs

Sia Foundation

Arweave

Crust Network

CESS Network

Flux

Golem Network

Nosana

Fluence Network

Hivemapper

DIMO

GEODNET

WeatherXM

NATIX Network

Wingbits

Silencio Network

FOAM

Nodle

XNET

Wicrypt

Roam

WiFi Map

Grass

Mysterium Network

Orchid Labs

Sentinel

Streamr

Pocket Network Foundation

IoTeX

peaq

Powerledger

Energy Web

Arkreen Network

Daylight

RAKwireless

Seeed Studio

Bobcat

Ruptela

DRIFE

Bacalhau

Xiamen Milesight IoT Co., Ltd.

Zhejiang Dusun IoT Technology Co., Ltd. / Dusun IoT

Xiamen Four-Faith Communication Technology Co., Ltd.

DePHY

Meson Network

#### Key Questions Answered

1. How big is the global Decentralized Physical Infrastructure Network (DePIN) Solutions market?
2. What is the demand of the global Decentralized Physical Infrastructure Network (DePIN) Solutions market?
3. What is the year over year growth of the global Decentralized Physical Infrastructure Network (DePIN) Solutions market?
4. What is the total value of the global Decentralized Physical Infrastructure Network (DePIN) Solutions market?
5. Who are the Major Players in the global Decentralized Physical Infrastructure Network (DePIN) Solutions market?
6. What are the growth factors driving the market demand?

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