

# Global Decentralized Physical Infrastructure Network (DePIN) Solutions Market 2026 by Company, Regions, Type and Application, Forecast to 2032

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## Abstracts

According to our (Global Info Research) latest study, the global Decentralized Physical Infrastructure Network (DePIN) Solutions market size was valued at US\$ 720 million in 2025 and is forecast to a readjusted size of US\$ 5265 million by 2032 with a CAGR of 31.1% during review period.

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 cyclicality. 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 is a detailed and comprehensive analysis for global Decentralized Physical Infrastructure Network (DePIN) Solutions market. Both quantitative and qualitative analyses are presented by company, by region & country, by Resource Type and by Application. As the market is constantly changing, this report explores the competition, supply and demand trends, as well as key factors that contribute to its changing demands across many markets. Company profiles and product examples of selected competitors, along with market share estimates of some of the selected leaders for the year 2025, are provided.

Key Features:

Global Decentralized Physical Infrastructure Network (DePIN) Solutions market size and forecasts, in consumption value (\$ Million), 2021-2032

Global Decentralized Physical Infrastructure Network (DePIN) Solutions market size and forecasts by region and country, in consumption value (\$ Million), 2021-2032

Global Decentralized Physical Infrastructure Network (DePIN) Solutions market size and forecasts, by Resource Type and by Application, in consumption value (\$ Million), 2021-2032

Global Decentralized Physical Infrastructure Network (DePIN) Solutions market shares of main players, in revenue (\$ Million), 2021-2026

The Primary Objectives in This Report Are:

To determine the size of the total market opportunity of global and key countries

To assess the growth potential for Decentralized Physical Infrastructure Network (DePIN) Solutions

To forecast future growth in each product and end-use market

To assess competitive factors affecting the marketplace

This report profiles key 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.

### Market segmentation

Decentralized Physical Infrastructure Network (DePIN) Solutions market is split by Resource Type and by Application. For the period 2021-2032, the growth among segments provides accurate calculations and forecasts for Consumption Value by Resource Type and by Application. This analysis can help you expand your business by targeting qualified niche markets.

### Market segment by Resource Type

- Compute Resource Networks

- Storage Resource Networks

- Connectivity Resource Networks

- Data / Sensor Resource Networks

- Other

### Market segment by Product Form

- Protocol / Network Layer

- Platform / API Layer

- Hardware Node Layer

- Middleware / Developer Tools

## Market segment by Customer Type

Enterprise Users

Developers and Web3 Applications

Infrastructure Contributors

Public Sector / Research Users

Other

## Market segment by Business Model

Hardware Sales

Usage-based Service Fees

Data Licensing

Enterprise Deployment / SaaS

## Market segment by Application

AI and Cloud Workloads

Mobility and Geospatial Intelligence

Wireless and Internet Access

Energy and Environmental Data

Other

Market segment by players, this report covers

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

Market segment by regions, regional analysis covers

North America (United States, Canada and Mexico)

Europe (Germany, France, UK, Russia, Italy and Rest of Europe)

Asia-Pacific (China, Japan, South Korea, India, Southeast Asia and Rest of Asia-Pacific)

South America (Brazil, Rest of South America)

Middle East & Africa (Turkey, Saudi Arabia, UAE, Rest of Middle East & Africa)

The content of the study subjects, includes a total of 13 chapters:

Chapter 1, to describe Decentralized Physical Infrastructure Network (DePIN) Solutions product scope, market overview, market estimation caveats and base year.

Chapter 2, to profile the top players of Decentralized Physical Infrastructure Network (DePIN) Solutions, with revenue, gross margin, and global market share of Decentralized Physical Infrastructure Network (DePIN) Solutions from 2021 to 2026.

Chapter 3, the Decentralized Physical Infrastructure Network (DePIN) Solutions competitive situation, revenue, and global market share of top players are analyzed emphatically by landscape contrast.

Chapter 4 and 5, to segment the market size by Resource Type and by Application, with consumption value and growth rate by Resource Type, by Application, from 2021 to 2032.

Chapter 6, 7, 8, 9, and 10, to break the market size data at the country level, with revenue and market share for key countries in the world, from 2021 to 2026. and Decentralized Physical Infrastructure Network (DePIN) Solutions market forecast, by regions, by Resource Type and by Application, with consumption value, from 2027 to 2032.

Chapter 11, market dynamics, drivers, restraints, trends, Porters Five Forces analysis.

Chapter 12, the key raw materials and key suppliers, and industry chain of Decentralized Physical Infrastructure Network (DePIN) Solutions.

Chapter 13, to describe Decentralized Physical Infrastructure Network (DePIN) Solutions research findings and conclusion.

## Contents

### 1 MARKET OVERVIEW

1.1 Product Overview and Scope

1.2 Market Estimation Caveats and Base Year

1.3 Classification of Decentralized Physical Infrastructure Network (DePIN) Solutions by Resource Type

1.3.1 Overview: Global Decentralized Physical Infrastructure Network (DePIN) Solutions Market Size by Resource Type: 2021 Versus 2025 Versus 2032

1.3.2 Global Decentralized Physical Infrastructure Network (DePIN) Solutions Consumption Value Market Share by Resource Type in 2025

1.3.3 Compute Resource Networks

1.3.4 Storage Resource Networks

1.3.5 Connectivity Resource Networks

1.3.6 Data / Sensor Resource Networks

1.3.7 Other

1.4 Classification of Decentralized Physical Infrastructure Network (DePIN) Solutions by Product Form

1.4.1 Overview: Global Decentralized Physical Infrastructure Network (DePIN) Solutions Market Size by Product Form: 2021 Versus 2025 Versus 2032

1.4.2 Global Decentralized Physical Infrastructure Network (DePIN) Solutions Consumption Value Market Share by Product Form in 2025

1.4.3 Protocol / Network Layer

1.4.4 Platform / API Layer

1.4.5 Hardware Node Layer

1.4.6 Middleware / Developer Tools

1.5 Classification of Decentralized Physical Infrastructure Network (DePIN) Solutions by Customer Type

1.5.1 Overview: Global Decentralized Physical Infrastructure Network (DePIN) Solutions Market Size by Customer Type: 2021 Versus 2025 Versus 2032

1.5.2 Global Decentralized Physical Infrastructure Network (DePIN) Solutions Consumption Value Market Share by Customer Type in 2025

1.5.3 Enterprise Users

1.5.4 Developers and Web3 Applications

1.5.5 Infrastructure Contributors

1.5.6 Public Sector / Research Users

1.5.7 Other

1.6 Classification of Decentralized Physical Infrastructure Network (DePIN) Solutions by

## Business Model

1.6.1 Overview: Global Decentralized Physical Infrastructure Network (DePIN)

Solutions Market Size by Business Model: 2021 Versus 2025 Versus 2032

1.6.2 Global Decentralized Physical Infrastructure Network (DePIN) Solutions

Consumption Value Market Share by Business Model in 2025

1.6.3 Hardware Sales

1.6.4 Usage-based Service Fees

1.6.5 Data Licensing

1.6.6 Enterprise Deployment / SaaS

1.7 Global Decentralized Physical Infrastructure Network (DePIN) Solutions Market by Application

1.7.1 Overview: Global Decentralized Physical Infrastructure Network (DePIN)

Solutions Market Size by Application: 2021 Versus 2025 Versus 2032

1.7.2 AI and Cloud Workloads

1.7.3 Mobility and Geospatial Intelligence

1.7.4 Wireless and Internet Access

1.7.5 Energy and Environmental Data

1.7.6 Other

1.8 Global Decentralized Physical Infrastructure Network (DePIN) Solutions Market Size & Forecast

1.9 Global Decentralized Physical Infrastructure Network (DePIN) Solutions Market Size and Forecast by Region

1.9.1 Global Decentralized Physical Infrastructure Network (DePIN) Solutions Market Size by Region: 2021 VS 2025 VS 2032

1.9.2 Global Decentralized Physical Infrastructure Network (DePIN) Solutions Market Size by Region, (2021-2032)

1.9.3 North America Decentralized Physical Infrastructure Network (DePIN) Solutions Market Size and Prospect (2021-2032)

1.9.4 Europe Decentralized Physical Infrastructure Network (DePIN) Solutions Market Size and Prospect (2021-2032)

1.9.5 Asia-Pacific Decentralized Physical Infrastructure Network (DePIN) Solutions Market Size and Prospect (2021-2032)

1.9.6 South America Decentralized Physical Infrastructure Network (DePIN) Solutions Market Size and Prospect (2021-2032)

1.9.7 Middle East & Africa Decentralized Physical Infrastructure Network (DePIN) Solutions Market Size and Prospect (2021-2032)

## 2 COMPANY PROFILES

## 2.1 Helium Foundation

### 2.1.1 Helium Foundation Details

### 2.1.2 Helium Foundation Major Business

### 2.1.3 Helium Foundation Decentralized Physical Infrastructure Network (DePIN)

#### Solutions Product and Solutions

### 2.1.4 Helium Foundation Decentralized Physical Infrastructure Network (DePIN)

#### Solutions Revenue, Gross Margin and Market Share (2021-2026)

### 2.1.5 Helium Foundation Recent Developments and Future Plans

## 2.2 Protocol Labs

### 2.2.1 Protocol Labs Details

### 2.2.2 Protocol Labs Major Business

### 2.2.3 Protocol Labs Decentralized Physical Infrastructure Network (DePIN) Solutions

#### Product and Solutions

### 2.2.4 Protocol Labs Decentralized Physical Infrastructure Network (DePIN) Solutions

#### Revenue, Gross Margin and Market Share (2021-2026)

### 2.2.5 Protocol Labs Recent Developments and Future Plans

## 2.3 Akash Network

### 2.3.1 Akash Network Details

### 2.3.2 Akash Network Major Business

### 2.3.3 Akash Network Decentralized Physical Infrastructure Network (DePIN) Solutions

#### Product and Solutions

### 2.3.4 Akash Network Decentralized Physical Infrastructure Network (DePIN) Solutions

#### Revenue, Gross Margin and Market Share (2021-2026)

### 2.3.5 Akash Network Recent Developments and Future Plans

## 2.4 Render Network Foundation

### 2.4.1 Render Network Foundation Details

### 2.4.2 Render Network Foundation Major Business

### 2.4.3 Render Network Foundation Decentralized Physical Infrastructure Network

#### (DePIN) Solutions Product and Solutions

### 2.4.4 Render Network Foundation Decentralized Physical Infrastructure Network

#### (DePIN) Solutions Revenue, Gross Margin and Market Share (2021-2026)

### 2.4.5 Render Network Foundation Recent Developments and Future Plans

## 2.5 Aethir

### 2.5.1 Aethir Details

### 2.5.2 Aethir Major Business

### 2.5.3 Aethir Decentralized Physical Infrastructure Network (DePIN) Solutions Product

#### and Solutions

### 2.5.4 Aethir Decentralized Physical Infrastructure Network (DePIN) Solutions

#### Revenue, Gross Margin and Market Share (2021-2026)

- 2.5.5 Aethir Recent Developments and Future Plans
- 2.6 io.net
  - 2.6.1 io.net Details
  - 2.6.2 io.net Major Business
  - 2.6.3 io.net Decentralized Physical Infrastructure Network (DePIN) Solutions Product and Solutions
  - 2.6.4 io.net Decentralized Physical Infrastructure Network (DePIN) Solutions Revenue, Gross Margin and Market Share (2021-2026)
  - 2.6.5 io.net Recent Developments and Future Plans
- 2.7 Livepeer
  - 2.7.1 Livepeer Details
  - 2.7.2 Livepeer Major Business
  - 2.7.3 Livepeer Decentralized Physical Infrastructure Network (DePIN) Solutions Product and Solutions
  - 2.7.4 Livepeer Decentralized Physical Infrastructure Network (DePIN) Solutions Revenue, Gross Margin and Market Share (2021-2026)
  - 2.7.5 Livepeer Recent Developments and Future Plans
- 2.8 Theta Labs
  - 2.8.1 Theta Labs Details
  - 2.8.2 Theta Labs Major Business
  - 2.8.3 Theta Labs Decentralized Physical Infrastructure Network (DePIN) Solutions Product and Solutions
  - 2.8.4 Theta Labs Decentralized Physical Infrastructure Network (DePIN) Solutions Revenue, Gross Margin and Market Share (2021-2026)
  - 2.8.5 Theta Labs Recent Developments and Future Plans
- 2.9 Storj Labs
  - 2.9.1 Storj Labs Details
  - 2.9.2 Storj Labs Major Business
  - 2.9.3 Storj Labs Decentralized Physical Infrastructure Network (DePIN) Solutions Product and Solutions
  - 2.9.4 Storj Labs Decentralized Physical Infrastructure Network (DePIN) Solutions Revenue, Gross Margin and Market Share (2021-2026)
  - 2.9.5 Storj Labs Recent Developments and Future Plans
- 2.10 Sia Foundation
  - 2.10.1 Sia Foundation Details
  - 2.10.2 Sia Foundation Major Business
  - 2.10.3 Sia Foundation Decentralized Physical Infrastructure Network (DePIN) Solutions Product and Solutions
  - 2.10.4 Sia Foundation Decentralized Physical Infrastructure Network (DePIN)

## Solutions Revenue, Gross Margin and Market Share (2021-2026)

### 2.10.5 Sia Foundation Recent Developments and Future Plans

## 2.11 Arweave

### 2.11.1 Arweave Details

### 2.11.2 Arweave Major Business

### 2.11.3 Arweave Decentralized Physical Infrastructure Network (DePIN) Solutions

## Product and Solutions

### 2.11.4 Arweave Decentralized Physical Infrastructure Network (DePIN) Solutions Revenue, Gross Margin and Market Share (2021-2026)

### 2.11.5 Arweave Recent Developments and Future Plans

## 2.12 Crust Network

### 2.12.1 Crust Network Details

### 2.12.2 Crust Network Major Business

### 2.12.3 Crust Network Decentralized Physical Infrastructure Network (DePIN) Solutions

## Product and Solutions

### 2.12.4 Crust Network Decentralized Physical Infrastructure Network (DePIN) Solutions Revenue, Gross Margin and Market Share (2021-2026)

### 2.12.5 Crust Network Recent Developments and Future Plans

## 2.13 CESS Network

### 2.13.1 CESS Network Details

### 2.13.2 CESS Network Major Business

### 2.13.3 CESS Network Decentralized Physical Infrastructure Network (DePIN)

## Solutions Product and Solutions

### 2.13.4 CESS Network Decentralized Physical Infrastructure Network (DePIN) Solutions Revenue, Gross Margin and Market Share (2021-2026)

### 2.13.5 CESS Network Recent Developments and Future Plans

## 2.14 Flux

### 2.14.1 Flux Details

### 2.14.2 Flux Major Business

### 2.14.3 Flux Decentralized Physical Infrastructure Network (DePIN) Solutions Product and Solutions

### 2.14.4 Flux Decentralized Physical Infrastructure Network (DePIN) Solutions Revenue, Gross Margin and Market Share (2021-2026)

### 2.14.5 Flux Recent Developments and Future Plans

## 2.15 Golem Network

### 2.15.1 Golem Network Details

### 2.15.2 Golem Network Major Business

### 2.15.3 Golem Network Decentralized Physical Infrastructure Network (DePIN) Solutions Product and Solutions

- 2.15.4 Golem Network Decentralized Physical Infrastructure Network (DePIN) Solutions Revenue, Gross Margin and Market Share (2021-2026)
- 2.15.5 Golem Network Recent Developments and Future Plans
- 2.16 Nosana
  - 2.16.1 Nosana Details
  - 2.16.2 Nosana Major Business
  - 2.16.3 Nosana Decentralized Physical Infrastructure Network (DePIN) Solutions Product and Solutions
  - 2.16.4 Nosana Decentralized Physical Infrastructure Network (DePIN) Solutions Revenue, Gross Margin and Market Share (2021-2026)
  - 2.16.5 Nosana Recent Developments and Future Plans
- 2.17 Fluence Network
  - 2.17.1 Fluence Network Details
  - 2.17.2 Fluence Network Major Business
  - 2.17.3 Fluence Network Decentralized Physical Infrastructure Network (DePIN) Solutions Product and Solutions
  - 2.17.4 Fluence Network Decentralized Physical Infrastructure Network (DePIN) Solutions Revenue, Gross Margin and Market Share (2021-2026)
  - 2.17.5 Fluence Network Recent Developments and Future Plans
- 2.18 Hivemapper
  - 2.18.1 Hivemapper Details
  - 2.18.2 Hivemapper Major Business
  - 2.18.3 Hivemapper Decentralized Physical Infrastructure Network (DePIN) Solutions Product and Solutions
  - 2.18.4 Hivemapper Decentralized Physical Infrastructure Network (DePIN) Solutions Revenue, Gross Margin and Market Share (2021-2026)
  - 2.18.5 Hivemapper Recent Developments and Future Plans
- 2.19 DIMO
  - 2.19.1 DIMO Details
  - 2.19.2 DIMO Major Business
  - 2.19.3 DIMO Decentralized Physical Infrastructure Network (DePIN) Solutions Product and Solutions
  - 2.19.4 DIMO Decentralized Physical Infrastructure Network (DePIN) Solutions Revenue, Gross Margin and Market Share (2021-2026)
  - 2.19.5 DIMO Recent Developments and Future Plans
- 2.20 GEODNET
  - 2.20.1 GEODNET Details
  - 2.20.2 GEODNET Major Business
  - 2.20.3 GEODNET Decentralized Physical Infrastructure Network (DePIN) Solutions

## Product and Solutions

2.20.4 GEODNET Decentralized Physical Infrastructure Network (DePIN) Solutions Revenue, Gross Margin and Market Share (2021-2026)

2.20.5 GEODNET Recent Developments and Future Plans

## 2.21 WeatherXM

2.21.1 WeatherXM Details

2.21.2 WeatherXM Major Business

2.21.3 WeatherXM Decentralized Physical Infrastructure Network (DePIN) Solutions Product and Solutions

2.21.4 WeatherXM Decentralized Physical Infrastructure Network (DePIN) Solutions Revenue, Gross Margin and Market Share (2021-2026)

2.21.5 WeatherXM Recent Developments and Future Plans

## 2.22 NATIX Network

2.22.1 NATIX Network Details

2.22.2 NATIX Network Major Business

2.22.3 NATIX Network Decentralized Physical Infrastructure Network (DePIN) Solutions Product and Solutions

2.22.4 NATIX Network Decentralized Physical Infrastructure Network (DePIN) Solutions Revenue, Gross Margin and Market Share (2021-2026)

2.22.5 NATIX Network Recent Developments and Future Plans

## 2.23 Wingbits

2.23.1 Wingbits Details

2.23.2 Wingbits Major Business

2.23.3 Wingbits Decentralized Physical Infrastructure Network (DePIN) Solutions Product and Solutions

2.23.4 Wingbits Decentralized Physical Infrastructure Network (DePIN) Solutions Revenue, Gross Margin and Market Share (2021-2026)

2.23.5 Wingbits Recent Developments and Future Plans

## 2.24 Silencio Network

2.24.1 Silencio Network Details

2.24.2 Silencio Network Major Business

2.24.3 Silencio Network Decentralized Physical Infrastructure Network (DePIN) Solutions Product and Solutions

2.24.4 Silencio Network Decentralized Physical Infrastructure Network (DePIN) Solutions Revenue, Gross Margin and Market Share (2021-2026)

2.24.5 Silencio Network Recent Developments and Future Plans

## 2.25 FOAM

2.25.1 FOAM Details

2.25.2 FOAM Major Business

2.25.3 FOAM Decentralized Physical Infrastructure Network (DePIN) Solutions Product and Solutions

2.25.4 FOAM Decentralized Physical Infrastructure Network (DePIN) Solutions Revenue, Gross Margin and Market Share (2021-2026)

2.25.5 FOAM Recent Developments and Future Plans

2.26 Nodle

2.26.1 Nodle Details

2.26.2 Nodle Major Business

2.26.3 Nodle Decentralized Physical Infrastructure Network (DePIN) Solutions Product and Solutions

2.26.4 Nodle Decentralized Physical Infrastructure Network (DePIN) Solutions Revenue, Gross Margin and Market Share (2021-2026)

2.26.5 Nodle Recent Developments and Future Plans

2.27 XNET

2.27.1 XNET Details

2.27.2 XNET Major Business

2.27.3 XNET Decentralized Physical Infrastructure Network (DePIN) Solutions Product and Solutions

2.27.4 XNET Decentralized Physical Infrastructure Network (DePIN) Solutions Revenue, Gross Margin and Market Share (2021-2026)

2.27.5 XNET Recent Developments and Future Plans

2.28 Wicrypt

2.28.1 Wicrypt Details

2.28.2 Wicrypt Major Business

2.28.3 Wicrypt Decentralized Physical Infrastructure Network (DePIN) Solutions Product and Solutions

2.28.4 Wicrypt Decentralized Physical Infrastructure Network (DePIN) Solutions Revenue, Gross Margin and Market Share (2021-2026)

2.28.5 Wicrypt Recent Developments and Future Plans

2.29 Roam

2.29.1 Roam Details

2.29.2 Roam Major Business

2.29.3 Roam Decentralized Physical Infrastructure Network (DePIN) Solutions Product and Solutions

2.29.4 Roam Decentralized Physical Infrastructure Network (DePIN) Solutions Revenue, Gross Margin and Market Share (2021-2026)

2.29.5 Roam Recent Developments and Future Plans

2.30 WiFi Map

2.30.1 WiFi Map Details

- 2.30.2 WiFi Map Major Business
- 2.30.3 WiFi Map Decentralized Physical Infrastructure Network (DePIN) Solutions Product and Solutions
- 2.30.4 WiFi Map Decentralized Physical Infrastructure Network (DePIN) Solutions Revenue, Gross Margin and Market Share (2021-2026)
- 2.30.5 WiFi Map Recent Developments and Future Plans
- 2.31 Grass
  - 2.31.1 Grass Details
  - 2.31.2 Grass Major Business
  - 2.31.3 Grass Decentralized Physical Infrastructure Network (DePIN) Solutions Product and Solutions
  - 2.31.4 Grass Decentralized Physical Infrastructure Network (DePIN) Solutions Revenue, Gross Margin and Market Share (2021-2026)
  - 2.31.5 Grass Recent Developments and Future Plans
- 2.32 Mysterium Network
  - 2.32.1 Mysterium Network Details
  - 2.32.2 Mysterium Network Major Business
  - 2.32.3 Mysterium Network Decentralized Physical Infrastructure Network (DePIN) Solutions Product and Solutions
  - 2.32.4 Mysterium Network Decentralized Physical Infrastructure Network (DePIN) Solutions Revenue, Gross Margin and Market Share (2021-2026)
  - 2.32.5 Mysterium Network Recent Developments and Future Plans
- 2.33 Orchid Labs
  - 2.33.1 Orchid Labs Details
  - 2.33.2 Orchid Labs Major Business
  - 2.33.3 Orchid Labs Decentralized Physical Infrastructure Network (DePIN) Solutions Product and Solutions
  - 2.33.4 Orchid Labs Decentralized Physical Infrastructure Network (DePIN) Solutions Revenue, Gross Margin and Market Share (2021-2026)
  - 2.33.5 Orchid Labs Recent Developments and Future Plans
- 2.34 Sentinel
  - 2.34.1 Sentinel Details
  - 2.34.2 Sentinel Major Business
  - 2.34.3 Sentinel Decentralized Physical Infrastructure Network (DePIN) Solutions Product and Solutions
  - 2.34.4 Sentinel Decentralized Physical Infrastructure Network (DePIN) Solutions Revenue, Gross Margin and Market Share (2021-2026)
  - 2.34.5 Sentinel Recent Developments and Future Plans
- 2.35 Streamr

- 2.35.1 Streamr Details
- 2.35.2 Streamr Major Business
- 2.35.3 Streamr Decentralized Physical Infrastructure Network (DePIN) Solutions Product and Solutions
- 2.35.4 Streamr Decentralized Physical Infrastructure Network (DePIN) Solutions Revenue, Gross Margin and Market Share (2021-2026)
- 2.35.5 Streamr Recent Developments and Future Plans
- 2.36 Pocket Network Foundation
  - 2.36.1 Pocket Network Foundation Details
  - 2.36.2 Pocket Network Foundation Major Business
  - 2.36.3 Pocket Network Foundation Decentralized Physical Infrastructure Network (DePIN) Solutions Product and Solutions
  - 2.36.4 Pocket Network Foundation Decentralized Physical Infrastructure Network (DePIN) Solutions Revenue, Gross Margin and Market Share (2021-2026)
  - 2.36.5 Pocket Network Foundation Recent Developments and Future Plans
- 2.37 IoTeX
  - 2.37.1 IoTeX Details
  - 2.37.2 IoTeX Major Business
  - 2.37.3 IoTeX Decentralized Physical Infrastructure Network (DePIN) Solutions Product and Solutions
  - 2.37.4 IoTeX Decentralized Physical Infrastructure Network (DePIN) Solutions Revenue, Gross Margin and Market Share (2021-2026)
  - 2.37.5 IoTeX Recent Developments and Future Plans
- 2.38 peaq
  - 2.38.1 peaq Details
  - 2.38.2 peaq Major Business
  - 2.38.3 peaq Decentralized Physical Infrastructure Network (DePIN) Solutions Product and Solutions
  - 2.38.4 peaq Decentralized Physical Infrastructure Network (DePIN) Solutions Revenue, Gross Margin and Market Share (2021-2026)
  - 2.38.5 peaq Recent Developments and Future Plans
- 2.39 Powerledger
  - 2.39.1 Powerledger Details
  - 2.39.2 Powerledger Major Business
  - 2.39.3 Powerledger Decentralized Physical Infrastructure Network (DePIN) Solutions Product and Solutions
  - 2.39.4 Powerledger Decentralized Physical Infrastructure Network (DePIN) Solutions Revenue, Gross Margin and Market Share (2021-2026)
  - 2.39.5 Powerledger Recent Developments and Future Plans

## 2.40 Energy Web

2.40.1 Energy Web Details

2.40.2 Energy Web Major Business

2.40.3 Energy Web Decentralized Physical Infrastructure Network (DePIN) Solutions Product and Solutions

2.40.4 Energy Web Decentralized Physical Infrastructure Network (DePIN) Solutions Revenue, Gross Margin and Market Share (2021-2026)

2.40.5 Energy Web Recent Developments and Future Plans

## 3 MARKET COMPETITION, BY PLAYERS

3.1 Global Decentralized Physical Infrastructure Network (DePIN) Solutions Revenue and Share by Players (2021-2026)

3.2 Market Share Analysis (2025)

3.2.1 Market Share of Decentralized Physical Infrastructure Network (DePIN) Solutions by Company Revenue

3.2.2 Top 3 Decentralized Physical Infrastructure Network (DePIN) Solutions Players Market Share in 2025

3.2.3 Top 6 Decentralized Physical Infrastructure Network (DePIN) Solutions Players Market Share in 2025

3.3 Decentralized Physical Infrastructure Network (DePIN) Solutions Market: Overall Company Footprint Analysis

3.3.1 Decentralized Physical Infrastructure Network (DePIN) Solutions Market: Region Footprint

3.3.2 Decentralized Physical Infrastructure Network (DePIN) Solutions Market: Company Product Type Footprint

3.3.3 Decentralized Physical Infrastructure Network (DePIN) Solutions Market: Company Product Application Footprint

3.4 New Market Entrants and Barriers to Market Entry

3.5 Mergers, Acquisition, Agreements, and Collaborations

## 4 MARKET SIZE SEGMENT BY RESOURCE TYPE

4.1 Global Decentralized Physical Infrastructure Network (DePIN) Solutions Consumption Value and Market Share by Resource Type (2021-2026)

4.2 Global Decentralized Physical Infrastructure Network (DePIN) Solutions Market Forecast by Resource Type (2027-2032)

## 5 MARKET SIZE SEGMENT BY APPLICATION

## 5.1 Global Decentralized Physical Infrastructure Network (DePIN) Solutions

Consumption Value Market Share by Application (2021-2026)

## 5.2 Global Decentralized Physical Infrastructure Network (DePIN) Solutions Market

Forecast by Application (2027-2032)

# 6 NORTH AMERICA

## 6.1 North America Decentralized Physical Infrastructure Network (DePIN) Solutions

Consumption Value by Resource Type (2021-2032)

## 6.2 North America Decentralized Physical Infrastructure Network (DePIN) Solutions

Market Size by Application (2021-2032)

## 6.3 North America Decentralized Physical Infrastructure Network (DePIN) Solutions

Market Size by Country

### 6.3.1 North America Decentralized Physical Infrastructure Network (DePIN) Solutions

Consumption Value by Country (2021-2032)

### 6.3.2 United States Decentralized Physical Infrastructure Network (DePIN) Solutions

Market Size and Forecast (2021-2032)

### 6.3.3 Canada Decentralized Physical Infrastructure Network (DePIN) Solutions Market

Size and Forecast (2021-2032)

### 6.3.4 Mexico Decentralized Physical Infrastructure Network (DePIN) Solutions Market

Size and Forecast (2021-2032)

# 7 EUROPE

## 7.1 Europe Decentralized Physical Infrastructure Network (DePIN) Solutions

Consumption Value by Resource Type (2021-2032)

## 7.2 Europe Decentralized Physical Infrastructure Network (DePIN) Solutions

Consumption Value by Application (2021-2032)

## 7.3 Europe Decentralized Physical Infrastructure Network (DePIN) Solutions Market

Size by Country

### 7.3.1 Europe Decentralized Physical Infrastructure Network (DePIN) Solutions

Consumption Value by Country (2021-2032)

### 7.3.2 Germany Decentralized Physical Infrastructure Network (DePIN) Solutions

Market Size and Forecast (2021-2032)

### 7.3.3 France Decentralized Physical Infrastructure Network (DePIN) Solutions Market

Size and Forecast (2021-2032)

### 7.3.4 United Kingdom Decentralized Physical Infrastructure Network (DePIN) Solutions

Market Size and Forecast (2021-2032)

7.3.5 Russia Decentralized Physical Infrastructure Network (DePIN) Solutions Market Size and Forecast (2021-2032)

7.3.6 Italy Decentralized Physical Infrastructure Network (DePIN) Solutions Market Size and Forecast (2021-2032)

## **8 ASIA-PACIFIC**

8.1 Asia-Pacific Decentralized Physical Infrastructure Network (DePIN) Solutions Consumption Value by Resource Type (2021-2032)

8.2 Asia-Pacific Decentralized Physical Infrastructure Network (DePIN) Solutions Consumption Value by Application (2021-2032)

8.3 Asia-Pacific Decentralized Physical Infrastructure Network (DePIN) Solutions Market Size by Region

8.3.1 Asia-Pacific Decentralized Physical Infrastructure Network (DePIN) Solutions Consumption Value by Region (2021-2032)

8.3.2 China Decentralized Physical Infrastructure Network (DePIN) Solutions Market Size and Forecast (2021-2032)

8.3.3 Japan Decentralized Physical Infrastructure Network (DePIN) Solutions Market Size and Forecast (2021-2032)

8.3.4 South Korea Decentralized Physical Infrastructure Network (DePIN) Solutions Market Size and Forecast (2021-2032)

8.3.5 India Decentralized Physical Infrastructure Network (DePIN) Solutions Market Size and Forecast (2021-2032)

8.3.6 Southeast Asia Decentralized Physical Infrastructure Network (DePIN) Solutions Market Size and Forecast (2021-2032)

8.3.7 Australia Decentralized Physical Infrastructure Network (DePIN) Solutions Market Size and Forecast (2021-2032)

## **9 SOUTH AMERICA**

9.1 South America Decentralized Physical Infrastructure Network (DePIN) Solutions Consumption Value by Resource Type (2021-2032)

9.2 South America Decentralized Physical Infrastructure Network (DePIN) Solutions Consumption Value by Application (2021-2032)

9.3 South America Decentralized Physical Infrastructure Network (DePIN) Solutions Market Size by Country

9.3.1 South America Decentralized Physical Infrastructure Network (DePIN) Solutions Consumption Value by Country (2021-2032)

9.3.2 Brazil Decentralized Physical Infrastructure Network (DePIN) Solutions Market

Size and Forecast (2021-2032)

9.3.3 Argentina Decentralized Physical Infrastructure Network (DePIN) Solutions  
Market Size and Forecast (2021-2032)

## **10 MIDDLE EAST & AFRICA**

10.1 Middle East & Africa Decentralized Physical Infrastructure Network (DePIN)  
Solutions Consumption Value by Resource Type (2021-2032)

10.2 Middle East & Africa Decentralized Physical Infrastructure Network (DePIN)  
Solutions Consumption Value by Application (2021-2032)

10.3 Middle East & Africa Decentralized Physical Infrastructure Network (DePIN)  
Solutions Market Size by Country

10.3.1 Middle East & Africa Decentralized Physical Infrastructure Network (DePIN)  
Solutions Consumption Value by Country (2021-2032)

10.3.2 Turkey Decentralized Physical Infrastructure Network (DePIN) Solutions Market  
Size and Forecast (2021-2032)

10.3.3 Saudi Arabia Decentralized Physical Infrastructure Network (DePIN) Solutions  
Market Size and Forecast (2021-2032)

10.3.4 UAE Decentralized Physical Infrastructure Network (DePIN) Solutions Market  
Size and Forecast (2021-2032)

## **11 MARKET DYNAMICS**

11.1 Decentralized Physical Infrastructure Network (DePIN) Solutions Market Drivers

11.2 Decentralized Physical Infrastructure Network (DePIN) Solutions Market Restraints

11.3 Decentralized Physical Infrastructure Network (DePIN) Solutions Trends Analysis

11.4 Porters Five Forces Analysis

11.4.1 Threat of New Entrants

11.4.2 Bargaining Power of Suppliers

11.4.3 Bargaining Power of Buyers

11.4.4 Threat of Substitutes

11.4.5 Competitive Rivalry

## **12 INDUSTRY CHAIN ANALYSIS**

12.1 Decentralized Physical Infrastructure Network (DePIN) Solutions Industry Chain

12.2 Decentralized Physical Infrastructure Network (DePIN) Solutions Upstream  
Analysis

12.3 Decentralized Physical Infrastructure Network (DePIN) Solutions Midstream

Analysis

12.4 Decentralized Physical Infrastructure Network (DePIN) Solutions Downstream

Analysis

## **13 RESEARCH FINDINGS AND CONCLUSION**

## **14 APPENDIX**

14.1 Methodology

14.2 Research Process and Data Source

14.3 Disclaimer

## List Of Tables

### LIST OF TABLES

- Table 1. Global Decentralized Physical Infrastructure Network (DePIN) Solutions Consumption Value by Resource Type, (USD Million), 2021 & 2025 & 2032
- Table 2. Global Decentralized Physical Infrastructure Network (DePIN) Solutions Consumption Value by Product Form, (USD Million), 2021 & 2025 & 2032
- Table 3. Global Decentralized Physical Infrastructure Network (DePIN) Solutions Consumption Value by Customer Type, (USD Million), 2021 & 2025 & 2032
- Table 4. Global Decentralized Physical Infrastructure Network (DePIN) Solutions Consumption Value by Business Model, (USD Million), 2021 & 2025 & 2032
- Table 5. Global Decentralized Physical Infrastructure Network (DePIN) Solutions Consumption Value by Application, (USD Million), 2021 & 2025 & 2032
- Table 6. Global Decentralized Physical Infrastructure Network (DePIN) Solutions Consumption Value by Region (2021-2026) & (USD Million)
- Table 7. Global Decentralized Physical Infrastructure Network (DePIN) Solutions Consumption Value by Region (2027-2032) & (USD Million)
- Table 8. Helium Foundation Company Information, Head Office, and Major Competitors
- Table 9. Helium Foundation Major Business
- Table 10. Helium Foundation Decentralized Physical Infrastructure Network (DePIN) Solutions Product and Solutions
- Table 11. Helium Foundation Decentralized Physical Infrastructure Network (DePIN) Solutions Revenue (USD Million), Gross Margin and Market Share (2021-2026)
- Table 12. Helium Foundation Recent Developments and Future Plans
- Table 13. Protocol Labs Company Information, Head Office, and Major Competitors
- Table 14. Protocol Labs Major Business
- Table 15. Protocol Labs Decentralized Physical Infrastructure Network (DePIN) Solutions Product and Solutions
- Table 16. Protocol Labs Decentralized Physical Infrastructure Network (DePIN) Solutions Revenue (USD Million), Gross Margin and Market Share (2021-2026)
- Table 17. Protocol Labs Recent Developments and Future Plans
- Table 18. Akash Network Company Information, Head Office, and Major Competitors
- Table 19. Akash Network Major Business
- Table 20. Akash Network Decentralized Physical Infrastructure Network (DePIN) Solutions Product and Solutions
- Table 21. Akash Network Decentralized Physical Infrastructure Network (DePIN) Solutions Revenue (USD Million), Gross Margin and Market Share (2021-2026)
- Table 22. Render Network Foundation Company Information, Head Office, and Major

## Competitors

Table 23. Render Network Foundation Major Business

Table 24. Render Network Foundation Decentralized Physical Infrastructure Network (DePIN) Solutions Product and Solutions

Table 25. Render Network Foundation Decentralized Physical Infrastructure Network (DePIN) Solutions Revenue (USD Million), Gross Margin and Market Share (2021-2026)

Table 26. Render Network Foundation Recent Developments and Future Plans

Table 27. Aethir Company Information, Head Office, and Major Competitors

Table 28. Aethir Major Business

Table 29. Aethir Decentralized Physical Infrastructure Network (DePIN) Solutions Product and Solutions

Table 30. Aethir Decentralized Physical Infrastructure Network (DePIN) Solutions Revenue (USD Million), Gross Margin and Market Share (2021-2026)

Table 31. Aethir Recent Developments and Future Plans

Table 32. io.net Company Information, Head Office, and Major Competitors

Table 33. io.net Major Business

Table 34. io.net Decentralized Physical Infrastructure Network (DePIN) Solutions Product and Solutions

Table 35. io.net Decentralized Physical Infrastructure Network (DePIN) Solutions Revenue (USD Million), Gross Margin and Market Share (2021-2026)

Table 36. io.net Recent Developments and Future Plans

Table 37. Livepeer Company Information, Head Office, and Major Competitors

Table 38. Livepeer Major Business

Table 39. Livepeer Decentralized Physical Infrastructure Network (DePIN) Solutions Product and Solutions

Table 40. Livepeer Decentralized Physical Infrastructure Network (DePIN) Solutions Revenue (USD Million), Gross Margin and Market Share (2021-2026)

Table 41. Livepeer Recent Developments and Future Plans

Table 42. Theta Labs Company Information, Head Office, and Major Competitors

Table 43. Theta Labs Major Business

Table 44. Theta Labs Decentralized Physical Infrastructure Network (DePIN) Solutions Product and Solutions

Table 45. Theta Labs Decentralized Physical Infrastructure Network (DePIN) Solutions Revenue (USD Million), Gross Margin and Market Share (2021-2026)

Table 46. Theta Labs Recent Developments and Future Plans

Table 47. Storj Labs Company Information, Head Office, and Major Competitors

Table 48. Storj Labs Major Business

Table 49. Storj Labs Decentralized Physical Infrastructure Network (DePIN) Solutions Product and Solutions

Table 50. Storj Labs Decentralized Physical Infrastructure Network (DePIN) Solutions Revenue (USD Million), Gross Margin and Market Share (2021-2026)

Table 51. Storj Labs Recent Developments and Future Plans

Table 52. Sia Foundation Company Information, Head Office, and Major Competitors

Table 53. Sia Foundation Major Business

Table 54. Sia Foundation Decentralized Physical Infrastructure Network (DePIN) Solutions Product and Solutions

Table 55. Sia Foundation Decentralized Physical Infrastructure Network (DePIN) Solutions Revenue (USD Million), Gross Margin and Market Share (2021-2026)

Table 56. Sia Foundation Recent Developments and Future Plans

Table 57. Arweave Company Information, Head Office, and Major Competitors

Table 58. Arweave Major Business

Table 59. Arweave Decentralized Physical Infrastructure Network (DePIN) Solutions Product and Solutions

Table 60. Arweave Decentralized Physical Infrastructure Network (DePIN) Solutions Revenue (USD Million), Gross Margin and Market Share (2021-2026)

Table 61. Arweave Recent Developments and Future Plans

Table 62. Crust Network Company Information, Head Office, and Major Competitors

Table 63. Crust Network Major Business

Table 64. Crust Network Decentralized Physical Infrastructure Network (DePIN) Solutions Product and Solutions

Table 65. Crust Network Decentralized Physical Infrastructure Network (DePIN) Solutions Revenue (USD Million), Gross Margin and Market Share (2021-2026)

Table 66. Crust Network Recent Developments and Future Plans

Table 67. CESS Network Company Information, Head Office, and Major Competitors

Table 68. CESS Network Major Business

Table 69. CESS Network Decentralized Physical Infrastructure Network (DePIN) Solutions Product and Solutions

Table 70. CESS Network Decentralized Physical Infrastructure Network (DePIN) Solutions Revenue (USD Million), Gross Margin and Market Share (2021-2026)

Table 71. CESS Network Recent Developments and Future Plans

Table 72. Flux Company Information, Head Office, and Major Competitors

Table 73. Flux Major Business

Table 74. Flux Decentralized Physical Infrastructure Network (DePIN) Solutions Product and Solutions

Table 75. Flux Decentralized Physical Infrastructure Network (DePIN) Solutions Revenue (USD Million), Gross Margin and Market Share (2021-2026)

Table 76. Flux Recent Developments and Future Plans

Table 77. Golem Network Company Information, Head Office, and Major Competitors

- Table 78. Golem Network Major Business
- Table 79. Golem Network Decentralized Physical Infrastructure Network (DePIN) Solutions Product and Solutions
- Table 80. Golem Network Decentralized Physical Infrastructure Network (DePIN) Solutions Revenue (USD Million), Gross Margin and Market Share (2021-2026)
- Table 81. Golem Network Recent Developments and Future Plans
- Table 82. Nosana Company Information, Head Office, and Major Competitors
- Table 83. Nosana Major Business
- Table 84. Nosana Decentralized Physical Infrastructure Network (DePIN) Solutions Product and Solutions
- Table 85. Nosana Decentralized Physical Infrastructure Network (DePIN) Solutions Revenue (USD Million), Gross Margin and Market Share (2021-2026)
- Table 86. Nosana Recent Developments and Future Plans
- Table 87. Fluence Network Company Information, Head Office, and Major Competitors
- Table 88. Fluence Network Major Business
- Table 89. Fluence Network Decentralized Physical Infrastructure Network (DePIN) Solutions Product and Solutions
- Table 90. Fluence Network Decentralized Physical Infrastructure Network (DePIN) Solutions Revenue (USD Million), Gross Margin and Market Share (2021-2026)
- Table 91. Fluence Network Recent Developments and Future Plans
- Table 92. Hivemapper Company Information, Head Office, and Major Competitors
- Table 93. Hivemapper Major Business
- Table 94. Hivemapper Decentralized Physical Infrastructure Network (DePIN) Solutions Product and Solutions
- Table 95. Hivemapper Decentralized Physical Infrastructure Network (DePIN) Solutions Revenue (USD Million), Gross Margin and Market Share (2021-2026)
- Table 96. Hivemapper Recent Developments and Future Plans
- Table 97. DIMO Company Information, Head Office, and Major Competitors
- Table 98. DIMO Major Business
- Table 99. DIMO Decentralized Physical Infrastructure Network (DePIN) Solutions Product and Solutions
- Table 100. DIMO Decentralized Physical Infrastructure Network (DePIN) Solutions Revenue (USD Million), Gross Margin and Market Share (2021-2026)
- Table 101. DIMO Recent Developments and Future Plans
- Table 102. GEODNET Company Information, Head Office, and Major Competitors
- Table 103. GEODNET Major Business
- Table 104. GEODNET Decentralized Physical Infrastructure Network (DePIN) Solutions Product and Solutions
- Table 105. GEODNET Decentralized Physical Infrastructure Network (DePIN) Solutions

Revenue (USD Million), Gross Margin and Market Share (2021-2026)

Table 106. GEODNET Recent Developments and Future Plans

Table 107. WeatherXM Company Information, Head Office, and Major Competitors

Table 108. WeatherXM Major Business

Table 109. WeatherXM Decentralized Physical Infrastructure Network (DePIN) Solutions Product and Solutions

Table 110. WeatherXM Decentralized Physical Infrastructure Network (DePIN) Solutions Revenue (USD Million), Gross Margin and Market Share (2021-2026)

Table 111. WeatherXM Recent Developments and Future Plans

Table 112. NATIX Network Company Information, Head Office, and Major Competitors

Table 113. NATIX Network Major Business

Table 114. NATIX Network Decentralized Physical Infrastructure Network (DePIN) Solutions Product and Solutions

Table 115. NATIX Network Decentralized Physical Infrastructure Network (DePIN) Solutions Revenue (USD Million), Gross Margin and Market Share (2021-2026)

Table 116. NATIX Network Recent Developments and Future Plans

Table 117. Wingbits Company Information, Head Office, and Major Competitors

Table 118. Wingbits Major Business

Table 119. Wingbits Decentralized Physical Infrastructure Network (DePIN) Solutions Product and Solutions

Table 120. Wingbits Decentralized Physical Infrastructure Network (DePIN) Solutions Revenue (USD Million), Gross Margin and Market Share (2021-2026)

Table 121. Wingbits Recent Developments and Future Plans

Table 122. Silencio Network Company Information, Head Office, and Major Competitors

Table 123. Silencio Network Major Business

Table 124. Silencio Network Decentralized Physical Infrastructure Network (DePIN) Solutions Product and Solutions

Table 125. Silencio Network Decentralized Physical Infrastructure Network (DePIN) Solutions Revenue (USD Million), Gross Margin and Market Share (2021-2026)

Table 126. Silencio Network Recent Developments and Future Plans

Table 127. FOAM Company Information, Head Office, and Major Competitors

Table 128. FOAM Major Business

Table 129. FOAM Decentralized Physical Infrastructure Network (DePIN) Solutions Product and Solutions

Table 130. FOAM Decentralized Physical Infrastructure Network (DePIN) Solutions Revenue (USD Million), Gross Margin and Market Share (2021-2026)

Table 131. FOAM Recent Developments and Future Plans

Table 132. Nodle Company Information, Head Office, and Major Competitors

Table 133. Nodle Major Business

Table 134. Nodle Decentralized Physical Infrastructure Network (DePIN) Solutions Product and Solutions

Table 135. Nodle Decentralized Physical Infrastructure Network (DePIN) Solutions Revenue (USD Million), Gross Margin and Market Share (2021-2026)

Table 136. Nodle Recent Developments and Future Plans

Table 137. XNET Company Information, Head Office, and Major Competitors

Table 138. XNET Major Business

Table 139. XNET Decentralized Physical Infrastructure Network (DePIN) Solutions Product and Solutions

Table 140. XNET Decentralized Physical Infrastructure Network (DePIN) Solutions Revenue (USD Million), Gross Margin and Market Share (2021-2026)

Table 141. XNET Recent Developments and Future Plans

Table 142. Wicrypt Company Information, Head Office, and Major Competitors

Table 143. Wicrypt Major Business

Table 144. Wicrypt Decentralized Physical Infrastructure Network (DePIN) Solutions Product and Solutions

Table 145. Wicrypt Decentralized Physical Infrastructure Network (DePIN) Solutions Revenue (USD Million), Gross Margin and Market Share (2021-2026)

Table 146. Wicrypt Recent Developments and Future Plans

Table 147. Roam Company Information, Head Office, and Major Competitors

Table 148. Roam Major Business

Table 149. Roam Decentralized Physical Infrastructure Network (DePIN) Solutions Product and Solutions

Table 150. Roam Decentralized Physical Infrastructure Network (DePIN) Solutions Revenue (USD Million), Gross Margin and Market Share (2021-2026)

Table 151. Roam Recent Developments and Future Plans

Table 152. WiFi Map Company Information, Head Office, and Major Competitors

Table 153. WiFi Map Major Business

Table 154. WiFi Map Decentralized Physical Infrastructure Network (DePIN) Solutions Product and Solutions

Table 155. WiFi Map Decentralized Physical Infrastructure Network (DePIN) Solutions Revenue (USD Million), Gross Margin and Market Share (2021-2026)

Table 156. WiFi Map Recent Developments and Future Plans

Table 157. Grass Company Information, Head Office, and Major Competitors

Table 158. Grass Major Business

Table 159. Grass Decentralized Physical Infrastructure Network (DePIN) Solutions Product and Solutions

Table 160. Grass Decentralized Physical Infrastructure Network (DePIN) Solutions Revenue (USD Million), Gross Margin and Market Share (2021-2026)

- Table 161. Grass Recent Developments and Future Plans
- Table 162. Mysterium Network Company Information, Head Office, and Major Competitors
- Table 163. Mysterium Network Major Business
- Table 164. Mysterium Network Decentralized Physical Infrastructure Network (DePIN) Solutions Product and Solutions
- Table 165. Mysterium Network Decentralized Physical Infrastructure Network (DePIN) Solutions Revenue (USD Million), Gross Margin and Market Share (2021-2026)
- Table 166. Mysterium Network Recent Developments and Future Plans
- Table 167. Orchid Labs Company Information, Head Office, and Major Competitors
- Table 168. Orchid Labs Major Business
- Table 169. Orchid Labs Decentralized Physical Infrastructure Network (DePIN) Solutions Product and Solutions
- Table 170. Orchid Labs Decentralized Physical Infrastructure Network (DePIN) Solutions Revenue (USD Million), Gross Margin and Market Share (2021-2026)
- Table 171. Orchid Labs Recent Developments and Future Plans
- Table 172. Sentinel Company Information, Head Office, and Major Competitors
- Table 173. Sentinel Major Business
- Table 174. Sentinel Decentralized Physical Infrastructure Network (DePIN) Solutions Product and Solutions
- Table 175. Sentinel Decentralized Physical Infrastructure Network (DePIN) Solutions Revenue (USD Million), Gross Margin and Market Share (2021-2026)
- Table 176. Sentinel Recent Developments and Future Plans
- Table 177. Streamr Company Information, Head Office, and Major Competitors
- Table 178. Streamr Major Business
- Table 179. Streamr Decentralized Physical Infrastructure Network (DePIN) Solutions Product and Solutions
- Table 180. Streamr Decentralized Physical Infrastructure Network (DePIN) Solutions Revenue (USD Million), Gross Margin and Market Share (2021-2026)
- Table 181. Streamr Recent Developments and Future Plans
- Table 182. Pocket Network Foundation Company Information, Head Office, and Major Competitors
- Table 183. Pocket Network Foundation Major Business
- Table 184. Pocket Network Foundation Decentralized Physical Infrastructure Network (DePIN) Solutions Product and Solutions
- Table 185. Pocket Network Foundation Decentralized Physical Infrastructure Network (DePIN) Solutions Revenue (USD Million), Gross Margin and Market Share (2021-2026)
- Table 186. Pocket Network Foundation Recent Developments and Future Plans
- Table 187. IoTeX Company Information, Head Office, and Major Competitors

- Table 188. IoTeX Major Business
- Table 189. IoTeX Decentralized Physical Infrastructure Network (DePIN) Solutions Product and Solutions
- Table 190. IoTeX Decentralized Physical Infrastructure Network (DePIN) Solutions Revenue (USD Million), Gross Margin and Market Share (2021-2026)
- Table 191. IoTeX Recent Developments and Future Plans
- Table 192. peaq Company Information, Head Office, and Major Competitors
- Table 193. peaq Major Business
- Table 194. peaq Decentralized Physical Infrastructure Network (DePIN) Solutions Product and Solutions
- Table 195. peaq Decentralized Physical Infrastructure Network (DePIN) Solutions Revenue (USD Million), Gross Margin and Market Share (2021-2026)
- Table 196. peaq Recent Developments and Future Plans
- Table 197. Powerledger Company Information, Head Office, and Major Competitors
- Table 198. Powerledger Major Business
- Table 199. Powerledger Decentralized Physical Infrastructure Network (DePIN) Solutions Product and Solutions
- Table 200. Powerledger Decentralized Physical Infrastructure Network (DePIN) Solutions Revenue (USD Million), Gross Margin and Market Share (2021-2026)
- Table 201. Powerledger Recent Developments and Future Plans
- Table 202. Energy Web Company Information, Head Office, and Major Competitors
- Table 203. Energy Web Major Business
- Table 204. Energy Web Decentralized Physical Infrastructure Network (DePIN) Solutions Product and Solutions
- Table 205. Energy Web Decentralized Physical Infrastructure Network (DePIN) Solutions Revenue (USD Million), Gross Margin and Market Share (2021-2026)
- Table 206. Energy Web Recent Developments and Future Plans
- Table 207. Global Decentralized Physical Infrastructure Network (DePIN) Solutions Revenue (USD Million) by Players (2021-2026)
- Table 208. Global Decentralized Physical Infrastructure Network (DePIN) Solutions Revenue Share by Players (2021-2026)
- Table 209. Breakdown of Decentralized Physical Infrastructure Network (DePIN) Solutions by Company Type (Tier 1, Tier 2, and Tier 3)
- Table 210. Market Position of Players in Decentralized Physical Infrastructure Network (DePIN) Solutions, (Tier 1, Tier 2, and Tier 3), Based on Revenue in 2025
- Table 211. Head Office of Key Decentralized Physical Infrastructure Network (DePIN) Solutions Players
- Table 212. Decentralized Physical Infrastructure Network (DePIN) Solutions Market: Company Product Type Footprint

Table 213. Decentralized Physical Infrastructure Network (DePIN) Solutions Market: Company Product Application Footprint

Table 214. Decentralized Physical Infrastructure Network (DePIN) Solutions New Market Entrants and Barriers to Market Entry

Table 215. Decentralized Physical Infrastructure Network (DePIN) Solutions Mergers, Acquisition, Agreements, and Collaborations

Table 216. Global Decentralized Physical Infrastructure Network (DePIN) Solutions Consumption Value (USD Million) by Resource Type (2021-2026)

Table 217. Global Decentralized Physical Infrastructure Network (DePIN) Solutions Consumption Value Share by Resource Type (2021-2026)

Table 218. Global Decentralized Physical Infrastructure Network (DePIN) Solutions Consumption Value Forecast by Resource Type (2027-2032)

Table 219. Global Decentralized Physical Infrastructure Network (DePIN) Solutions Consumption Value by Application (2021-2026)

Table 220. Global Decentralized Physical Infrastructure Network (DePIN) Solutions Consumption Value Forecast by Application (2027-2032)

Table 221. North America Decentralized Physical Infrastructure Network (DePIN) Solutions Consumption Value by Resource Type (2021-2026) & (USD Million)

Table 222. North America Decentralized Physical Infrastructure Network (DePIN) Solutions Consumption Value by Resource Type (2027-2032) & (USD Million)

Table 223. North America Decentralized Physical Infrastructure Network (DePIN) Solutions Consumption Value by Application (2021-2026) & (USD Million)

Table 224. North America Decentralized Physical Infrastructure Network (DePIN) Solutions Consumption Value by Application (2027-2032) & (USD Million)

Table 225. North America Decentralized Physical Infrastructure Network (DePIN) Solutions Consumption Value by Country (2021-2026) & (USD Million)

Table 226. North America Decentralized Physical Infrastructure Network (DePIN) Solutions Consumption Value by Country (2027-2032) & (USD Million)

Table 227. Europe Decentralized Physical Infrastructure Network (DePIN) Solutions Consumption Value by Resource Type (2021-2026) & (USD Million)

Table 228. Europe Decentralized Physical Infrastructure Network (DePIN) Solutions Consumption Value by Resource Type (2027-2032) & (USD Million)

Table 229. Europe Decentralized Physical Infrastructure Network (DePIN) Solutions Consumption Value by Application (2021-2026) & (USD Million)

Table 230. Europe Decentralized Physical Infrastructure Network (DePIN) Solutions Consumption Value by Application (2027-2032) & (USD Million)

Table 231. Europe Decentralized Physical Infrastructure Network (DePIN) Solutions Consumption Value by Country (2021-2026) & (USD Million)

Table 232. Europe Decentralized Physical Infrastructure Network (DePIN) Solutions

Consumption Value by Country (2027-2032) & (USD Million)

Table 233. Asia-Pacific Decentralized Physical Infrastructure Network (DePIN) Solutions Consumption Value by Resource Type (2021-2026) & (USD Million)

Table 234. Asia-Pacific Decentralized Physical Infrastructure Network (DePIN) Solutions Consumption Value by Resource Type (2027-2032) & (USD Million)

Table 235. Asia-Pacific Decentralized Physical Infrastructure Network (DePIN) Solutions Consumption Value by Application (2021-2026) & (USD Million)

Table 236. Asia-Pacific Decentralized Physical Infrastructure Network (DePIN) Solutions Consumption Value by Application (2027-2032) & (USD Million)

Table 237. Asia-Pacific Decentralized Physical Infrastructure Network (DePIN) Solutions Consumption Value by Region (2021-2026) & (USD Million)

Table 238. Asia-Pacific Decentralized Physical Infrastructure Network (DePIN) Solutions Consumption Value by Region (2027-2032) & (USD Million)

Table 239. South America Decentralized Physical Infrastructure Network (DePIN) Solutions Consumption Value by Resource Type (2021-2026) & (USD Million)

Table 240. South America Decentralized Physical Infrastructure Network (DePIN) Solutions Consumption Value by Resource Type (2027-2032) & (USD Million)

Table 241. South America Decentralized Physical Infrastructure Network (DePIN) Solutions Consumption Value by Application (2021-2026) & (USD Million)

Table 242. South America Decentralized Physical Infrastructure Network (DePIN) Solutions Consumption Value by Application (2027-2032) & (USD Million)

Table 243. South America Decentralized Physical Infrastructure Network (DePIN) Solutions Consumption Value by Country (2021-2026) & (USD Million)

Table 244. South America Decentralized Physical Infrastructure Network (DePIN) Solutions Consumption Value by Country (2027-2032) & (USD Million)

Table 245. Middle East & Africa Decentralized Physical Infrastructure Network (DePIN) Solutions Consumption Value by Resource Type (2021-2026) & (USD Million)

Table 246. Middle East & Africa Decentralized Physical Infrastructure Network (DePIN) Solutions Consumption Value by Resource Type (2027-2032) & (USD Million)

Table 247. Middle East & Africa Decentralized Physical Infrastructure Network (DePIN) Solutions Consumption Value by Application (2021-2026) & (USD Million)

Table 248. Middle East & Africa Decentralized Physical Infrastructure Network (DePIN) Solutions Consumption Value by Application (2027-2032) & (USD Million)

Table 249. Middle East & Africa Decentralized Physical Infrastructure Network (DePIN) Solutions Consumption Value by Country (2021-2026) & (USD Million)

Table 250. Middle East & Africa Decentralized Physical Infrastructure Network (DePIN) Solutions Consumption Value by Country (2027-2032) & (USD Million)

Table 251. Global Key Players of Decentralized Physical Infrastructure Network (DePIN) Solutions Upstream (Raw Materials)

Table 252. Global Decentralized Physical Infrastructure Network (DePIN) Solutions  
Typical Customers

## List Of Figures

### LIST OF FIGURES

Figure 1. Decentralized Physical Infrastructure Network (DePIN) Solutions Picture

Figure 2. Global Decentralized Physical Infrastructure Network (DePIN) Solutions Consumption Value by Resource Type, (USD Million), 2021 & 2025 & 2032

Figure 3. Global Decentralized Physical Infrastructure Network (DePIN) Solutions Consumption Value Market Share by Resource Type in 2025

Figure 4. Compute Resource Networks

Figure 5. Storage Resource Networks

Figure 6. Connectivity Resource Networks

Figure 7. Data / Sensor Resource Networks

Figure 8. Other

Figure 9. Global Decentralized Physical Infrastructure Network (DePIN) Solutions Consumption Value by Product Form, (USD Million), 2021 & 2025 & 2032

Figure 10. Global Decentralized Physical Infrastructure Network (DePIN) Solutions Consumption Value Market Share by Product Form in 2025

Figure 11. Protocol / Network Layer

Figure 12. Platform / API Layer

Figure 13. Hardware Node Layer

Figure 14. Middleware / Developer Tools

Figure 15. Global Decentralized Physical Infrastructure Network (DePIN) Solutions Consumption Value by Customer Type, (USD Million), 2021 & 2025 & 2032

Figure 16. Global Decentralized Physical Infrastructure Network (DePIN) Solutions Consumption Value Market Share by Customer Type in 2025

Figure 17. Enterprise Users

Figure 18. Developers and Web3 Applications

Figure 19. Infrastructure Contributors

Figure 20. Public Sector / Research Users

Figure 21. Other

Figure 22. Global Decentralized Physical Infrastructure Network (DePIN) Solutions Consumption Value by Business Model, (USD Million), 2021 & 2025 & 2032

Figure 23. Global Decentralized Physical Infrastructure Network (DePIN) Solutions Consumption Value Market Share by Business Model in 2025

Figure 24. Hardware Sales

Figure 25. Usage-based Service Fees

Figure 26. Data Licensing

Figure 27. Enterprise Deployment / SaaS

Figure 28. Global Decentralized Physical Infrastructure Network (DePIN) Solutions Consumption Value by Application, (USD Million), 2021 & 2025 & 2032

Figure 29. Decentralized Physical Infrastructure Network (DePIN) Solutions Consumption Value Market Share by Application in 2025

Figure 30. AI and Cloud Workloads Picture

Figure 31. Mobility and Geospatial Intelligence Picture

Figure 32. Wireless and Internet Access Picture

Figure 33. Energy and Environmental Data Picture

Figure 34. Other Picture

Figure 35. Global Decentralized Physical Infrastructure Network (DePIN) Solutions Consumption Value, (USD Million): 2021 & 2025 & 2032

Figure 36. Global Decentralized Physical Infrastructure Network (DePIN) Solutions Consumption Value and Forecast (2021-2032) & (USD Million)

Figure 37. Global Market Decentralized Physical Infrastructure Network (DePIN) Solutions Consumption Value (USD Million) Comparison by Region (2021 VS 2025 VS 2032)

Figure 38. Global Decentralized Physical Infrastructure Network (DePIN) Solutions Consumption Value Market Share by Region (2021-2032)

Figure 39. Global Decentralized Physical Infrastructure Network (DePIN) Solutions Consumption Value Market Share by Region in 2025

Figure 40. North America Decentralized Physical Infrastructure Network (DePIN) Solutions Consumption Value (2021-2032) & (USD Million)

Figure 41. Europe Decentralized Physical Infrastructure Network (DePIN) Solutions Consumption Value (2021-2032) & (USD Million)

Figure 42. Asia-Pacific Decentralized Physical Infrastructure Network (DePIN) Solutions Consumption Value (2021-2032) & (USD Million)

Figure 43. South America Decentralized Physical Infrastructure Network (DePIN) Solutions Consumption Value (2021-2032) & (USD Million)

Figure 44. Middle East & Africa Decentralized Physical Infrastructure Network (DePIN) Solutions Consumption Value (2021-2032) & (USD Million)

Figure 45. Company Three Recent Developments and Future Plans

Figure 46. Global Decentralized Physical Infrastructure Network (DePIN) Solutions Revenue Share by Players in 2025

Figure 47. Decentralized Physical Infrastructure Network (DePIN) Solutions Market Share by Company Type (Tier 1, Tier 2, and Tier 3) in 2025

Figure 48. Market Share of Decentralized Physical Infrastructure Network (DePIN) Solutions by Player Revenue in 2025

Figure 49. Top 3 Decentralized Physical Infrastructure Network (DePIN) Solutions Players Market Share in 2025

Figure 50. Top 6 Decentralized Physical Infrastructure Network (DePIN) Solutions Players Market Share in 2025

Figure 51. Global Decentralized Physical Infrastructure Network (DePIN) Solutions Consumption Value Share by Resource Type (2021-2026)

Figure 52. Global Decentralized Physical Infrastructure Network (DePIN) Solutions Market Share Forecast by Resource Type (2027-2032)

Figure 53. Global Decentralized Physical Infrastructure Network (DePIN) Solutions Consumption Value Share by Application (2021-2026)

Figure 54. Global Decentralized Physical Infrastructure Network (DePIN) Solutions Market Share Forecast by Application (2027-2032)

Figure 55. North America Decentralized Physical Infrastructure Network (DePIN) Solutions Consumption Value Market Share by Resource Type (2021-2032)

Figure 56. North America Decentralized Physical Infrastructure Network (DePIN) Solutions Consumption Value Market Share by Application (2021-2032)

Figure 57. North America Decentralized Physical Infrastructure Network (DePIN) Solutions Consumption Value Market Share by Country (2021-2032)

Figure 58. United States Decentralized Physical Infrastructure Network (DePIN) Solutions Consumption Value (2021-2032) & (USD Million)

Figure 59. Canada Decentralized Physical Infrastructure Network (DePIN) Solutions Consumption Value (2021-2032) & (USD Million)

Figure 60. Mexico Decentralized Physical Infrastructure Network (DePIN) Solutions Consumption Value (2021-2032) & (USD Million)

Figure 61. Europe Decentralized Physical Infrastructure Network (DePIN) Solutions Consumption Value Market Share by Resource Type (2021-2032)

Figure 62. Europe Decentralized Physical Infrastructure Network (DePIN) Solutions Consumption Value Market Share by Application (2021-2032)

Figure 63. Europe Decentralized Physical Infrastructure Network (DePIN) Solutions Consumption Value Market Share by Country (2021-2032)

Figure 64. Germany Decentralized Physical Infrastructure Network (DePIN) Solutions Consumption Value (2021-2032) & (USD Million)

Figure 65. France Decentralized Physical Infrastructure Network (DePIN) Solutions Consumption Value (2021-2032) & (USD Million)

Figure 66. United Kingdom Decentralized Physical Infrastructure Network (DePIN) Solutions Consumption Value (2021-2032) & (USD Million)

Figure 67. Russia Decentralized Physical Infrastructure Network (DePIN) Solutions Consumption Value (2021-2032) & (USD Million)

Figure 68. Italy Decentralized Physical Infrastructure Network (DePIN) Solutions Consumption Value (2021-2032) & (USD Million)

Figure 69. Asia-Pacific Decentralized Physical Infrastructure Network (DePIN) Solutions

Consumption Value Market Share by Resource Type (2021-2032)

Figure 70. Asia-Pacific Decentralized Physical Infrastructure Network (DePIN) Solutions

Consumption Value Market Share by Application (2021-2032)

Figure 71. Asia-Pacific Decentralized Physical Infrastructure Network (DePIN) Solutions

Consumption Value Market Share by Region (2021-2032)

Figure 72. China Decentralized Physical Infrastructure Network (DePIN) Solutions

Consumption Value (2021-2032) & (USD Million)

Figure 73. Japan Decentralized Physical Infrastructure Network (DePIN) Solutions

Consumption Value (2021-2032) & (USD Million)

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