

Germany Residential Gateway - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts (2024 - 2029)

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Abstracts

The Germany Residential Gateway Market size is estimated at USD 417.40 million in 2024, and is expected to reach USD 668.60 million by 2029, growing at a CAGR of 9.88% during the forecast period (2024-2029).

Rising internet and broadband penetration among consumers in Germany is one of the major drivers of the German residential gateway market. The high penetration of the internet in the country's households has necessitated the demand for residential gateway devices, such as modems and routers, for seamless and reliable connectivity.

Key Highlights

With increased broadband penetration and technological advances in home networking, there is a considerable market demand for residential gateway devices in Germany. Households in Germany are increasingly populated with various digital devices, multimedia applications, networked appliances, voice and data communications platforms, entertainment systems, and much more.

In addition, the rising demand for Internet connection sharing, simultaneous Internet access, and in-home audio and video streaming have driven the demand for residential gateway devices in Germany. Additionally, the shifting inclination toward smart homes among consumers in Germany has facilitated the utilization of residential gateway devices in households, thus supporting market growth.

Moreover, the combination of work-from-home and smart home initiatives is creating significant demand for robust, reliable, and performant Wi-Fi environments in

households across Germany, and residential gateway devices are gaining traction to deliver the necessary connectivity features that enable users to take advantage of networked homes. Market vendors are capitalizing on the opportunity and offering residential gateway devices on advanced Wi-Fi standards to deliver the requisite speed, reliability, and low latency to improve the performance of devices in home environments.

Also, smart home devices have been increasingly adopted in Germany. Connected devices such as smart thermostats, security cameras, and voice assistants rely on a stable and high-speed internet connection, necessitating the use of advanced residential gateways.

Germany is witnessing a growing number of personal data breaches and has become the second-largest country in terms of data breaches. Data breaches' escalating frequency and severity represent a formidable restraint for the residential gateway market. As the gateway serves as the primary entry point for data into a home network, its vulnerability to cyber threats becomes a paramount concern for consumers and manufacturers alike.

The COVID-19 pandemic resulted in a significant uptake of residential gateway devices in Germany owing to prolonged lockdowns, which proliferated the demand for high-speed internet connectivity for online gaming, remote work, and streaming services. Post-pandemic, the rising demand for high-speed and reliable internet connectivity and the significant uptake of various consumer electronic devices, such as smart home devices, television (TV), laptops, and smartphones in the country's residential sector, are positively influencing the market's growth in Germany.

Germany Residential Gateway Market Trends

Routers to Hold Major Market Share

With the growth of smart devices, remote work, and high-definition streaming, the demand for reliable and high-speed home networking devices such as routers has surged in Germany. Major market vendors in the country offer routers that support many devices for 4K streaming, AR/VR gaming, online learning, smart home, and video calling. For instance, Linksys's Hydra Pro 6E (AXE6600) simultaneously provides multi-gigabit speed to more than 55 devices. Similarly, TP-Link's Archer AX72 Pro router can connect 100+ devices and supports MU-MIMO and OFDMA to reduce congestion and quadruple the average throughput.

Moreover, market players such as TP-Link, D-Link, AVM GmbH, and Linksys constantly innovate their router offerings to meet the ever-evolving demand for reliable and high-speed network connectivity in households across Germany. For instance, D-link offers the EAGLE PRO AI AX1500 Smart Router in Germany, which combines the latest Wi-Fi 6 technology with Artificial Intelligence, offering improved Wi-Fi coverage and speed that is constantly optimized and improved for reliable, efficient, and fast Internet coverage in households.

DSL routers are analyzed to gain significant demand in the German residential gateway market, supported by the continuous launch of new DSL routers by significant market vendors that support versatile connectivity, ultra-fast speed, and high-quality telephony. For instance, TP-Link's AC2100 Wi-Fi MU-MIMO VDSL/ADSL telephony modem router offers internet speeds of up to 350 Mbps using the latest Super VDSL technology (VDSL2 Profile 35b). The routers come with 4? Gigabit LAN ports that help wired devices achieve peak HD streaming and gaming performance.

Overall, as trends such as 4K/8K Streaming, AR/VR Gaming, Online Gaming, Online Learning, Video Conferencing, and Working from Home gain momentum in Germany, the demand for routers utilizing advanced Wi-Fi standards such as Wi-Fi 6E and Wi-Fi 7 will witness growth in the coming years. In addition, continuous innovation in routers by major market vendors to support the growing demand for reliable network connectivity in households will drive the demand for routers over the forecast period.

Digital Subscriber Lines (DSL) to Witness Growth

The demand for always-on internet connectivity has been increasing significantly in German households owing to growing online activities such as online gaming, video calls, streaming, and working from home. This has driven the demand for DSL connections in the German residential gateway market as the connection between DSL and residential gateway devices such as modems and routers, etc., allows internet service providers (ISPs) to offer high-speed connections over existing telephone lines in households across Germany.

By offering, modems are analyzed to witness significant traction in the DSL segment over the forecast period to connect to the Internet Service Provider (ISP) and provide internet in households. The rising demand for high-speed connections among

households and significant penetration of DSL in households across Germany drive the demand for residential gateway devices such as modems to connect a router or computer to telephone lines for the internet.

Market vendors in the country offer residential gateway devices utilizing advanced Wi-Fi standards such as Wi-Fi 6 for DSL connections. For instance, AVM GmbH offers FRITZ! Box 7590 AX utilizes Wi-Fi 6 for high-speed home network connectivity. VDSL 35b supervectoring in FRITZ! Box 7590 AX can achieve speeds of up to 300 Mbit/s and more on conventional lines.

Overall, the demand for digital Subscriber Lines (DSL) connections in the German residential gateway market is analyzed to grow over the forecast period, primarily supported by the high penetration of DSL across households in Germany and the ever-increasing demand for broadband internet access in Germany. As of 2023, there were 38.2 million Active Fixed Broadband Connections across Germany. Furthermore, the DSL connection setup is fast and easy, considering many homes in Germany still use landline phones, thus further supporting the segment growth.

Germany Residential Gateway Industry Overview

The German Residential Gateway Market is fragmented and competitive, with the presence of major players like Cisco Systems Inc., TP-Link Corporation Pte. Ltd, D-Link Corporation, Huawei Technologies Co. Ltd, and Hewlett Packard Enterprise Company. Players in the market are adopting strategies such as partnerships, mergers and acquisitions, and investments to enhance their products and gain sustainable competitive advantage.

In March 2024, ZTE Corporation participated in the FTTH Conference 2024 in Berlin, Germany. The conference brought together corporate executives, decision-makers, thought leaders, and investors from the optical communication industry. To improve Wi-Fi signal coverage at home, ZTE Corporation presented an innovative connected home solution, which includes Wi-Fi 7, XGS-PON ONT, Mesh Wi-Fi & FTTR, and SCP (Smart Cloud Platform) management platform.

In October 2023, Linksys announced that it had launched its first Wi-Fi 7 Mesh System for home connectivity, Linksys Velop Pro 7. With this launch, the company provides the Wi-Fi operating mode to date, and it delivers fast streaming, collaboration, and gaming

experiences and can be set up in less than 10 minutes.

Additional Benefits:

The market estimate (ME) sheet in Excel format

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