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IoT Connectivity in Telecom Market Forecasts to 2034 – Global Analysis By Technology (Cellular Connectivity, LPWAN, Satellite Connectivity, and Short-Range Connectivity), Network Type Component, Deployment Model, Application, End User and By Geography

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Abstracts

According to Stratistics MRC, the Global IoT Connectivity in Telecom Market is accounted for $18.4 billion in 2026 and is expected to reach $78.6 billion by 2034 growing at a CAGR of 19.8% during the forecast period. IoT connectivity in telecom refers to cellular, LPWAN, satellite, and short-range wireless technology connectivity solutions enabling telecommunications operators to provide network access for billions of industrial sensors, smart meters, connected vehicles, wearables, smart city infrastructure, and consumer IoT devices across public, private, and hybrid network deployment models, encompassing NB-IoT, LTE-M, LoRaWAN, Sigfox, satellite IoT, Bluetooth, Zigbee, and Wi-Fi HaLow connectivity technologies managed through telecom operator IoT platform and connectivity management infrastructure.

Market Dynamics:

Driver:

Industrial IoT Enterprise Market Expansion

Rapid enterprise adoption of industrial IoT solutions for predictive maintenance, asset tracking, smart manufacturing, and supply chain visibility across manufacturing, logistics, energy, and agriculture sectors generating tens of billions of connected device

deployments requiring scalable telecommunications operator-managed IoT connectivity creates substantial revenue opportunity for operators building premium IoT connectivity service portfolios. Private 5G network deployment for enterprise IoT is emerging as a high-margin connectivity service product enabling operators to capture enterprise IoT market value directly from industrial customers.

Restraint:

IoT Device Fragmentation Management Complexity

IoT connectivity ecosystem fragmentation across multiple competing standards, frequency bands, protocol variants, and regional regulatory differences creating device management complexity for both IoT application developers and telecommunications operators managing diverse IoT device portfolios across heterogeneous connectivity technologies generates interoperability challenges and platform complexity that constrains simplified IoT service delivery and increases operator IoT platform development investment requirements.

Opportunity:

Private 5G Enterprise IoT Market

Enterprise private 5G network deployment for dedicated industrial IoT and automation connectivity representing a rapidly growing premium telecommunications market segment where operators providing turnkey private network deployment, management, and IoT connectivity services command substantially higher revenue per connection than public network shared connectivity pricing. Manufacturing, mining, port, and airport private network programs creating large enterprise customer opportunities for operators with private network service delivery capability and enterprise solution expertise.

Threat:

Non-Telco IoT Platform Provider Competition

Technology company IoT platform and connectivity management solution providers including Amazon AWS IoT, Microsoft Azure IoT Hub, and Google Cloud IoT building direct enterprise IoT solution relationships that bypass telecommunications operator IoT service portfolios by managing IoT device connectivity through cellular SIM management APIs create disintermediation risk as hyperscaler cloud IoT platforms

capture enterprise IoT solution value that operators previously expected to capture through operator-branded IoT service products.

Covid-19 Impact:

COVID-19 supply chain disruption management requirements creating demand for asset tracking, remote monitoring, and predictive maintenance IoT solutions as enterprises sought operational visibility and resilience through digital monitoring technology accelerated industrial IoT deployment programs. Smart city IoT infrastructure investment for contact tracing, crowd management, and public health monitoring generated municipal IoT deployment demand. Post-pandemic industrial digitalization acceleration sustains IoT connectivity market growth.

The Short-Range Connectivity segment is expected to be the largest during the forecast period

The Short-Range Connectivity segment is expected to account for the largest market share during the forecast period, due to the massive consumer IoT device ecosystem using Bluetooth, Wi-Fi, and Zigbee short-range connectivity for smart home, wearable, and personal area network applications representing the highest total connected device volume within the IoT connectivity landscape, combined with industrial and retail IoT applications using Wi-Fi and Bluetooth gateway architectures that aggregate large short-range device populations through telecom operator-managed cellular backhaul connectivity.

The Public Networks segment is expected to have the highest CAGR during the forecast period

Over the forecast period, the Public Networks segment is predicted to witness the highest growth rate, driven by massive IoT device deployment across smart meter, smart city, and consumer IoT applications using public NB-IoT and LTE-M networks that telecommunications operators have deployed as standard network capabilities enabling low-cost IoT device connection at scale. 5G Reduced Capability device standard commercialization creating new public network IoT connectivity use cases supporting higher throughput IoT applications beyond LPWAN capability sustains strong public network IoT growth.

Region with largest share:

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During the forecast period, the North America region is expected to hold the largest market share, due to the United States hosting highly developed enterprise IoT and consumer IoT markets with leading telecommunications operators including AT&T, Verizon, and T-Mobile operating established IoT connectivity service portfolios generating substantial domestic revenue, and strong enterprise private network deployment programs creating premium IoT connectivity revenue streams beyond commodity M2M connectivity services.

Region with highest CAGR:

Over the forecast period, the Asia Pacific region is anticipated to exhibit the highest CAGR, due to China hosting the world's largest NB-IoT deployment with hundreds of millions of connected smart meter and utility devices, Japan and South Korea leading IoT innovation deployment programs, and rapidly growing industrial IoT adoption across manufacturing sectors in Southeast Asia and India creating expanding IoT connectivity service market demand.

Key players in the market

Some of the key players in IoT Connectivity in Telecom Market include Cisco Systems, AT&T, Verizon Communications, Deutsche Telekom, Telef?nica, Vodafone Group, Orange S.A., China Mobile, China Telecom, Nokia Corporation, Ericsson, Huawei Technologies, Amazon Web Services, Microsoft Corporation, and Telit Cinterion.

Key Developments:

In April 2026, Verizon Communications launched a new private 5G enterprise IoT managed service portfolio enabling manufacturers to deploy dedicated industrial IoT networks with guaranteed SLA performance and integrated IoT device management platform administration.

In March 2026, Deutsche Telekom introduced a pan-European IoT connectivity aggregation platform enabling enterprises to manage multi-operator NB-IoT and LTE-M connectivity across 30 European countries through a single SIM and management interface.

Technologies Covered:

Cellular Connectivity

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LPWAN

Satellite Connectivity

Short-Range Connectivity

Network Types Covered:

Public Networks

Private Networks

Hybrid Networks

Components Covered:

Connectivity Services

Platforms

Hardware

Deployment Models Covered:

Cloud-Based

On-Premises

Applications Covered:

Asset Tracking & Monitoring

Smart Metering

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- Industrial Automation
- Smart Cities
- Connected Vehicles
- Healthcare
- Agriculture
- Retail & Logistics
- Energy & Utilities

End Users Covered:

- Manufacturing
- Transportation & Logistics
- Healthcare
- Energy & Utilities
- Agriculture
- Retail
- Government & Smart Cities
- Automotive

Regions Covered:

- North America
  - US

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- Canada
- Mexico

Europe

- Germany
- UK
- Italy
- France
- Spain
- Rest of Europe

Asia Pacific

- Japan
- China
- India
- Australia
- New Zealand
- South Korea
- Rest of Asia Pacific

South America

- Argentina

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Brazil

Chile

Rest of South America

Middle East & Africa

Saudi Arabia

UAE

Qatar

South Africa

Rest of Middle East & Africa

What our report offers:
- Market share assessments for the regional and country-level segments
- Strategic recommendations for the new entrants
- Covers Market data for the years 2023, 2024, 2025, 2026, 2027, 2028, 2029, 2030, 2032 and 2034
- Market Trends (Drivers, Constraints, Opportunities, Threats, Challenges, Investment Opportunities, and recommendations)
- Strategic recommendations in key business segments based on the market estimations
- Competitive landscaping mapping the key common trends
- Company profiling with detailed strategies, financials, and recent developments
- Supply chain trends mapping the latest technological advancements

Free Customization Offerings:

All the customers of this report will be entitled to receive one of the following free customization options:

Company Profiling

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Comprehensive profiling of additional market players (up to 3)

SWOT Analysis of key players (up to 3)

Regional Segmentation

Market estimations, Forecasts and CAGR of any prominent country as per the client's interest (Note: Depends on feasibility check)

Competitive Benchmarking

Benchmarking of key players based on product portfolio, geographical presence, and strategic alliances

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