

IoT Chip Market – Global Industry Size, Share, Trends, Opportunity, and Forecast Segmented,

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Abstracts

Global IoT Chip Market was valued at USD 18.57 Billion in 2022 and is anticipated to project robust growth in the forecast period with a CAGR of 15.11% through 2028, The growth is primarily attributed to the integration of connectivity competence in a wide range of devices and applications, coupled with the development of different networking protocols that have appreciably driven the growth of the IoT chip market across multiple end-user industries.

In March 2022, two Indian researchers working at the Massachusetts Institute of Technology (MIT) built a low-power security chip designed to prevent side-channel attacks (SCA) against Internet of Things (IoT) devices. SCA uses vulnerabilities to allow information gleaned from the indirect effects of the behavior of system hardware rather than directly attacking programs and software.

With the rapid increase in the number of IoT devices, the chip requirement for building these IoT devices is also expected to rise over the forecast period. Along with this, reducing energy consumption combined with the miniaturization of chips will be the priority of manufacturers.

The increased deployment of 5G provides quick and efficient connectivity for Internet-of-Things (IoT) devices. Investments in the deployment of 5G technology are expected to drive market growth during the forecast period and beyond. The integration of 5G technology is seen as the next generation of mobile internet connectivity and is expected to offer faster and more reliable connections than current technologies. Thus, the booming IoT space and the supporting chip makers are expected to increase demand for IoT chips during the forecast period.

Rising security concerns, such as software vulnerabilities and cyberattacks, may discourage many customers from using IoT devices. Such security concerns in the Internet of Things are particularly essential to organizations in healthcare, finance, manufacturing, logistics, retail, and other industries that have already started adopting IoT systems.

With the COVID-19 outbreak worldwide, the market was significantly affected as severe supply chain shortages occurred across the globe. Moreover, the restriction imposed by governments across the globe on the movement of people also impacted production. However, as the world recovers from the pandemic, the need for more automated and advanced processes has become a key aspect of success. As such, the market for more IoT-enabled devices is anticipated to rise in the future, thereby creating strong demand for IoT chips across the globe.

Key Market Drivers

The IoT Chip Market: A Macro Perspective

The global IoT chip market has witnessed remarkable growth in recent years and is poised for continued expansion. IoT chips, also known as IoT integrated circuits (ICs), serve as the brain of IoT devices, facilitating data processing and communication. These chips are found in a wide range of applications, from smart appliances and wearable devices to industrial sensors and autonomous vehicles.

As of my last knowledge update in September 2021, the global IoT chip market was already experiencing impressive growth. It was estimated to be worth over \$20 billion, with a compound annual growth rate (CAGR) of over 15% expected over the following five years. This market is dynamic and continually evolving, making it essential to examine the driving factors that enable such growth.

The Driving Forces Behind IoT Chip Market Growth

One of the primary drivers of the IoT chip market is the growing number of IoT devices across various sectors. From smart homes and cities to industrial applications, healthcare, and agriculture, the demand for connected devices has been steadily increasing. This proliferation necessitates a corresponding growth in IoT chip production.

The development of advanced connectivity standards, such as 5G and LPWAN (Low-

Power Wide-Area Network), has further boosted the IoT chip market. These standards provide faster and more reliable communication, enabling IoT devices to function seamlessly, even in remote areas. This improved connectivity fuels the adoption of IoT devices, spurring the demand for IoT chips.

Miniaturization and Power Efficiency

IoT devices are often small, portable, and battery-powered. IoT chips have evolved to become smaller and more power-efficient, making them suitable for a broader range of applications. This miniaturization and power efficiency make IoT devices more practical and attractive for consumers and industries.

Edge computing is a key trend in the IoT ecosystem. It involves processing data at the device or gateway level, rather than transmitting it to distant cloud servers. IoT chips with enhanced processing capabilities are crucial for enabling edge computing, reducing latency, and enhancing real-time decision-making in IoT applications.

Security Concerns

Security remains a significant concern in the IoT landscape. IoT chips are evolving to incorporate robust security features, including encryption and authentication mechanisms, to protect data and devices from cyber threats. As security becomes increasingly critical, the demand for IoT chips with integrated security features is on the rise.

Industry-Specific Applications

IoT chips are tailored for specific industries, such as healthcare, agriculture, and automotive. These specialized chips offer industry-specific features and capabilities, driving adoption in these sectors. For example, IoT chips for healthcare may include medical-grade sensors and data encryption, while those for agriculture could focus on soil and weather monitoring.

Government initiatives and regulations can significantly impact the IoT chip market. Policies that promote IoT adoption in areas like smart cities, environmental monitoring, and public safety drive the demand for IoT chips. Furthermore, regulations related to data privacy and security standards influence the development of secure IoT chips.

The IoT chip market growth is intrinsically tied to the semiconductor manufacturing

ecosystem. Advancements in semiconductor fabrication processes, the development of innovative materials, and the establishment of foundries for IoT-specific chip production contribute to the market's expansion. The global IoT chip market is on an upward trajectory, driven by various factors that include the proliferation of IoT devices, improved connectivity standards, miniaturization and power efficiency, edge computing, security concerns, industry-specific applications, government initiatives, and the evolving manufacturing ecosystem. Key players like Qualcomm, Intel, NVIDIA, ARM Holdings, and Texas Instruments are instrumental in shaping the market's landscape.

The future of the IoT chip market is promising, with the continued growth of IoT applications across industries. As the world becomes more connected, IoT chips will remain the linchpin of this transformation, enabling smarter, more efficient, and secure IoT ecosystems. While the figures and dynamics provided here are based on information available until September 2021, the IoT chip market's evolution is a story that continues to unfold, and it will be fascinating to observe its progress in the years to come.

Key Market Challenges

Challenges Facing the Global IoT Chip Market

Security Concerns

Security is one of the most significant challenges facing the IoT chip market. IoT devices are often deployed in critical applications, including healthcare, transportation, and industrial automation, making them attractive targets for cyberattacks. Inadequate security measures can lead to data breaches, privacy violations, and even physical harm in the case of critical infrastructure.

Addressing this challenge requires the development of IoT chips with robust security features, including encryption, secure boot processes, and secure key storage. Ensuring that IoT devices are regularly updated to protect against known vulnerabilities is also crucial. Manufacturers, government bodies, and industry standards organizations must collaborate to establish rigorous security standards.

Interoperability and Standards

IoT devices from various manufacturers and across different industries need to communicate seamlessly to create a cohesive IoT ecosystem. However, the lack of

standardized communication protocols and interoperability challenges hinder the growth of the IoT chip market.

The industry must work towards establishing unified standards for data exchange, device management, and communication protocols. Initiatives like the Industrial Internet Consortium (IIC) and the Open Connectivity Foundation (OCF) are steps in the right direction, but broader collaboration is required.

Power Efficiency

Many IoT devices are battery-powered or have limited power sources. Ensuring these devices operate efficiently while conserving power is a significant challenge. IoT chips must strike a balance between performance and power consumption.

Innovations in low-power chip designs, energy-efficient processors, and advancements in battery technology are necessary to address this challenge. Additionally, optimizing software and applications for power efficiency is critical.

Data Privacy and Ownership

IoT devices collect vast amounts of data, raising concerns about data privacy and ownership. Consumers and organizations need assurance that their data is secure and that they retain ownership and control over it.

Regulatory frameworks like the General Data Protection Regulation (GDPR) in Europe and the California Consumer Privacy Act (CCPA) in the United States are steps towards addressing data privacy concerns. IoT chip manufacturers must embed features that allow users to control and secure their data, and governments should continue to refine data privacy regulations.

Complexity of Ecosystem Integration

IoT ecosystems are composed of various devices, sensors, gateways, and cloud services, making integration a complex process. Ensuring that these components work together seamlessly is a major challenge.

Standardized APIs (Application Programming Interfaces), middleware solutions, and device management platforms can help simplify integration. However, achieving true plug-and-play compatibility remains a work in progress.

IoT solutions often start as small deployments and grow over time. Ensuring that IoT chips and systems can scale to accommodate increasing device counts and data volumes is a challenge. Scalability can be addressed through modular design, cloud-based infrastructure, and flexible software solutions. Scalable IoT architecture is essential for meeting the evolving needs of businesses and industries.

Environmental Impact

The production and disposal of IoT chips and devices have environmental consequences. Electronic waste (e-waste) is a growing concern, as is the energy consumption of IoT devices.

Efforts to design IoT chips with longer lifespans, recyclable materials, and energy-efficient components are essential to mitigate the environmental impact. Manufacturers should also consider end-of-life solutions for IoT devices to minimize e-waste.

The cost of IoT chips, particularly for low-end and mass-market applications, is a challenge. Reducing costs while maintaining performance and security is a balancing act. Advancements in manufacturing processes, economies of scale, and increased competition can help drive down costs. It is crucial for manufacturers to optimize their supply chains and production processes.

Ethical and Societal Concerns

The IoT chip market also faces ethical and societal challenges. Questions about the ethical use of IoT data, surveillance concerns, and the impact of automation on employment are significant considerations.

Addressing these challenges requires robust ethical guidelines and regulations. Transparency and public discourse are also essential in navigating these complex issues.

Key Market Trends

The Internet of Things (IoT) is at the forefront of technological innovation, revolutionizing industries and reshaping the way we live and work. At the heart of this transformation lies the IoT chip market, which plays a pivotal role in enabling the connectivity, data processing, and intelligence that power IoT devices. In this in-depth analysis, we will

explore the current and emerging trends in the global IoT chip market, shedding light on the key developments shaping its trajectory.

The IoT Chip Market: An Overview

Before delving into the trends, let's establish an understanding of the current state of the global IoT chip market.

Emerging Trends in the Global IoT Chip Market

5G Connectivity

The rollout of 5G networks is a pivotal trend in the IoT chip market. 5G promises higher data speeds, lower latency, and greater network capacity, which are essential for the proliferation of IoT devices. IoT chips with 5G capabilities are being developed to take advantage of these enhancements, enabling real-time communication and supporting applications in areas such as autonomous vehicles, augmented reality, and telemedicine. The increased bandwidth and reduced latency offered by 5G are opening up new possibilities for IoT applications, particularly those that demand rapid data transfer and low latency, such as smart cities and connected industrial processes.

Edge Computing

Edge computing is gaining prominence as an essential trend in the IoT chip market. This approach involves processing data at or near the data source, rather than sending it to a centralized cloud server. IoT chips are evolving to accommodate more robust processing capabilities, making edge computing more feasible. By processing data at the edge, IoT devices can reduce latency and respond to real-time events, which is vital for applications like autonomous vehicles, industrial automation, and smart healthcare. Edge computing also minimizes the data transfer and storage costs associated with cloud computing.

AI and Machine Learning Integration

The integration of artificial intelligence (AI) and machine learning (ML) capabilities within IoT chips is another transformative trend. IoT devices are becoming more intelligent, allowing them to analyze data locally and make real-time decisions without relying on cloud-based services. This not only improves response times but also reduces the dependency on stable network connectivity. IoT chips with AI and ML capabilities are

empowering a wide range of applications, from predictive maintenance in manufacturing to natural language processing in voice-activated smart assistants. As AI continues to advance, IoT chips are expected to become more powerful and efficient at handling AI workloads.

Low-Power IoT Chips

Power efficiency remains a critical trend in the IoT chip market. Many IoT devices are battery-powered or rely on energy harvesting methods, necessitating low-power chip designs. Manufacturers are continually working on improving the energy efficiency of IoT chips, allowing devices to operate for longer durations on a single charge or energy source.

Innovations in power management, low-power communication protocols, and advanced semiconductor fabrication processes are making it possible for IoT devices to function efficiently while minimizing power consumption. This trend is vital for applications like wearables, remote sensors, and smart home devices.

Specialized IoT Chips

IoT chips are increasingly being tailored for specific industries and applications. Specialized IoT chips offer features and capabilities designed to meet the unique requirements of particular sectors. For example: In healthcare, IoT chips are equipped with medical-grade sensors and data encryption for monitoring and transmitting patient data securely.

In agriculture, specialized IoT chips focus on soil and weather monitoring to optimize crop yields and conserve resources.

In automotive, IoT chips enable advanced driver-assistance systems (ADAS) and support autonomous vehicle functionality.

By creating IoT chips that cater to the specific needs of various industries, manufacturers are making it easier for businesses to adopt IoT technology for their particular applications.

Security-Enhanced IoT Chips

As the number of connected devices grows, security concerns have become

increasingly significant. IoT chips are evolving to incorporate robust security features to protect data and devices from cyber threats. These security-enhanced IoT chips include features like hardware-based encryption, secure boot processes, and secure key storage.

Ensuring the security of IoT devices and data is crucial, especially in critical applications such as healthcare, financial services, and critical infrastructure. As the threat landscape evolves, IoT chip manufacturers will continue to improve security features to stay ahead of potential vulnerabilities.

IoT Chip Miniaturization

Miniaturization of IoT chips is a trend that aligns with the demand for smaller, more compact IoT devices. Smaller chips enable the development of sleek and unobtrusive IoT devices that can be integrated seamlessly into various environments. Miniaturized IoT chips are vital for wearables, smart sensors, and compact IoT devices where space is at a premium. These smaller chips also contribute to energy efficiency and are often used in resource-constrained environments.

Enhanced Environmental Sustainability

IoT chips and devices have an environmental impact in terms of production, energy consumption, and electronic waste (e-waste). The trend of enhancing environmental sustainability involves designing IoT chips and devices with a focus on reducing their carbon footprint.

Segmental Insights

End User Insights

Industry 4.0 and the IoT have become mainstream for new technological approaches in development, production, and logistics chains. The growing adoption of industrial 4.0 has kept IoT demand in manufacturing at maximum through increasing machine-to-machine connections and embedded sensors and the increasing need for factory efficiency on the floor and on the field.

In July 2022, according to Economic Times's survey, cellular IoT module chipset shipments grew in India, and Qualcomm led the market with a 42% share. The company has been broadening its IoT chipset portfolio, targeting premium 4G and 5G

solutions for verticals such as retail, industrial, smart cities, and more. Most manufacturers implement IoT devices to leverage predictive maintenance and sophisticated data analytics. This improves productivity and availability and adds value to their business offerings. For instance, GE is looking for opportunities in the IoT with industrial analytics. In addition, Apotex upgraded its manufacturing processes to automate manual processes. This includes ensuring consistent batch production by introducing RFID, sorting, and process flow tracking. Due to this, the company had real-time visibility into manufacturing operations.

Furthermore, the industrial IoT trend is aided by smart factory initiatives, such as the Smart Manufacturing Leadership Coalition (SMLC) in the United States. This drives and facilitates the broad adoption of manufacturing intelligence due to massive amounts of machine and sensor data that need collection, processing, and formation of decisions.

In June 2022, the Ministry of Foreign Affairs stated that the European market for Internet of Things (IoT) solutions is accelerating. Germany, the UK, and the Netherlands lead Europe in IoT adoption, while Eastern European and Nordic countries follow closely. The manufacturing, home, healthcare, and financial sectors are at the forefront of IoT adoption, but retail and agriculture are also seeing impressive growth. Such advancement in multiple sectors will leverage the IoT chip market across Europe. The deployment of the wireless chip, including eLTE or NB-IoT chip for their manufacturing terminal, has been gaining traction over the years. For instance, Huawei collaborated with industrial partners to make smart terminals used in traditional manufacturing for uploading equipment data and receiving commands. eLTE or NB-IoT chip is added to the manufacturing terminal for transmitting data generated by the terminal via the eLTE or NB-IoT network, enabling manufacturing data to be collected and commands issued.

Regional Insights

Asia-Pacific accounts for a significant share of spending in IoT, with Singapore and South Korea as major markets adopting IoT chips. According to the Organization for Economic Co-operation and Development, South Korea is the first prominent market to connect more to the internet per habitat.

In July 2022, KIOXIA Corporation and Western Digital Corporation announced their joint venture Fab7 manufacturing facility at Yokkaichi Plant had received approval from the Japanese government for a subsidy of up to JPY 92.9 billion. The subsidy is granted under a special government program to promote corporate investment in state-of-the-art semiconductor manufacturing facilities and ensure the stable production of

semiconductors in Japan. Such collaborations in the region will help the IoT chip market to grow.

IoT's infrastructure includes the demand for better wireless connectivity solutions to enable new phases in automation and transportation owing to the rise in demand for IoT chips and ICs in smart cities and domestic automation in the areas such as connected automobiles and smart transportation systems.

Further, Asian governments are deeply integrating IoT in their long-term development projects. For instance, China's central government selected over 200 cities to pilot smart city projects. The cities include Beijing, Shanghai, Guangzhou, and Hangzhou. Furthermore, India's vision to transform 100 cities into smart cities is expected to promote electronics through smart homes and the automotive sector. In May 2022, Cyient partnered with IIT Hyderabad, India (IITH) and WiSig Networks, a start-up company founded in IITH, to launch India's first designed and engineered chip, Koala NB-IoT SoC (Narrowband IoT SoC). The Memorandum of Understanding (MOU) signed between the two aligns with the goals of MEITY (Ministry of Electronics and Information Technology, India) to build a vibrant semiconductor design and innovation ecosystem to serve the Indian world and further promote its development into a global electronics manufacturing and design hub.

The region is expected to be a prominent provider of IoT spending as there is increased use of connected devices in sectors such as manufacturing. Increased adoption of 5G is helping the market grow in the upcoming years as there is an increase in IoT services.

Key Market Players

Intel Corporation

Qualcomm Technologies Inc

Texas Instruments Incorporated

NXP Semiconductors NV

Microchip Technology Inc

MediaTek Inc.

STMicroelectronics NV

Renesas Electronics Corporation

Huawei Technologies Co. Ltd.

NVIDIA Corporation

Cypress Semiconductor Corporation

Report Scope:

In this report, the Global IoT Chip Market has been segmented into the following categories, in addition to the industry trends which have also been detailed below:

Global IoT Chip Market, By Product:

Processor

Sensor

Connectivity IC

Memory Device

Logic Device

Global IoT Chip Market, By End User:

Healthcare

Consumer Electronics

Industrial

Automotive

BFSI

Retail

Building Automation

Global IoT Chip Market, By Region:

North America

United States

Canada

Mexico

Asia-Pacific

China

India

Japan

South Korea

Indonesia

Europe

Germany

United Kingdom

France

Russia

Spain

South America

Brazil

Argentina

Middle East & Africa

Saudi Arabia

South Africa

Egypt

UAE

Israel

Competitive Landscape

Company Profiles: Detailed analysis of the major companies presents in the Global IoT Chip Market.

Available Customizations:

Global IoT Chip Market report with the given market data, Tech Sci Research offers customizations according to a company's specific needs. The following customization options are available for the report:

Company Information

Detailed analysis and profiling of additional market players (up to five).

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