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IoT Node and Gateway Market – Global Industry Size, Share, Trends, Opportunity, and Forecast,Segmented By Hardware (Processor, Sensor, Wired, Wireless, Connectivity IC, Memory Device), End User (BFSI, Healthcare, Wearable, Consumer Electronics, Agriculture, Building & Automation), By Region, By Competition Forecast & Opportunities, 2018-2028F

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Abstracts

Global IoT Chip Market was valued at USD 357.60 billion in 2022 and is anticipated to project robust growth in the forecast period with a CAGR of 5.19% through 2028.

An IoT (Internet of Things) chip, also known as an IoT microchip or IoT integrated circuit, is a specialized semiconductor device designed to enable the functionality of IoT devices. These chips serve as the core processing units within IoT devices and play a pivotal role in connecting physical objects to the digital world. Here is a comprehensive definition of an IoT chip:

IoT Chip Functionality:

IoT chips are engineered to perform a range of functions critical to IoT device operation. Their primary roles include:

Data Sensing and Collection: IoT chips are equipped with sensors that can detect and collect various types of data from the physical environment. These sensors can include temperature sensors, motion sensors, light sensors, and more, depending on the specific application.

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Data Processing: IoT chips process the data collected by sensors, enabling the extraction of meaningful information and insights. This processing may involve data filtering, analysis, or computation to reduce the volume of data transmitted and to make real-time decisions.

Connectivity: IoT chips facilitate communication between the IoT device and other devices, systems, or cloud platforms. They are equipped with communication modules, such as Wi-Fi, Bluetooth, cellular, or Low-Power Wide-Area Network (LPWAN) technologies, allowing data transmission and reception.

Power Management: Energy efficiency is a critical aspect of IoT devices, especially those running on batteries or energy-harvesting sources. IoT chips incorporate power management features to optimize energy usage and extend device battery life.

Security: IoT chips often include hardware-based security features, such as encryption engines and secure boot mechanisms, to protect data and device integrity from cybersecurity threats.

IoT Chip Types:

IoT chips come in various types to cater to the diverse needs of IoT applications:

Microcontrollers (MCUs): MCUs are commonly used IoT chips known for their low power consumption, making them suitable for resource-constrained devices like sensors and wearables.

Application Processors: Application processors offer higher processing power and multitasking capabilities, suitable for more complex IoT devices like smartphones and gateways.

Digital Signal Processors (DSPs): DSPs are specialized processors designed for handling digital signals and are used in IoT applications involving audio, video, and sensor data processing.

Customized ASICs (Application-Specific Integrated Circuits): Some IoT applications require custom-designed chips tailored to specific functions, such as image processing or machine learning.

Key Market Drivers

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Proliferation of IoT Devices and Applications

The proliferation of IoT devices and applications is a primary driver of the global IoT chip market. IoT technology is being integrated into various industries, including healthcare, smart cities, agriculture, and manufacturing. These applications require specialized chips that can enable connectivity, sensor data processing, and communication. As the number of IoT devices continues to grow, so does the demand for IoT chips. In agriculture, for instance, IoT sensors are used to monitor soil conditions and optimize irrigation. In healthcare, wearable IoT devices collect patient data for remote monitoring. These diverse applications drive the need for a wide range of IoT chips tailored to specific use cases, spurring innovation and growth in the market.

Advancements in Wireless Connectivity

Advancements in wireless connectivity technologies, such as 5G, Wi-Fi 6, and low-power wide-area networks (LPWAN), are driving the IoT chip market. These technologies enable faster and more reliable data transmission between IoT devices and the cloud or edge servers. As IoT devices become more data-intensive and require low-latency connections, the demand for high-performance IoT chips equipped with advanced connectivity features increases. 5G, in particular, is expected to revolutionize the IoT landscape by offering ultra-fast speeds, low latency, and massive device connectivity. IoT chips designed to harness the capabilities of 5G will play a pivotal role in unlocking the full potential of IoT applications, including autonomous vehicles, smart cities, and industrial automation.

Edge Computing and AI Integration

The integration of edge computing and artificial intelligence (AI) into IoT devices is another driver of the IoT chip market. Edge computing enables data processing and analytics to occur closer to the data source, reducing latency and enhancing real-time decision-making. IoT chips with AI capabilities, such as machine learning inference, enable intelligent data processing at the edge. Industries like autonomous vehicles, smart manufacturing, and surveillance systems benefit from IoT chips that can process data locally and make instant decisions without relying solely on cloud-based resources. This trend drives the demand for IoT chips with embedded AI processing units, opening up new opportunities for chip manufacturers.

Increasing Demand for Energy-Efficient Chips

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Energy efficiency is a critical driver of the IoT chip market, especially as many IoT devices operate on battery power or have strict power constraints. IoT chips need to be highly energy-efficient to prolong battery life and reduce maintenance requirements. Low-power IoT chips, often based on technologies like ARM Cortex-M and RISC-V, are in high demand for applications like remote sensors, wearables, and IoT-enabled appliances. Energy-efficient chips enable IoT devices to operate for extended periods without frequent battery replacement or recharging, making them more practical and cost-effective for users.

Growing Investment in Smart Infrastructure

The increasing investment in smart infrastructure projects worldwide is boosting the IoT chip market. Governments and municipalities are embracing IoT technology to create smart cities with connected infrastructure, including intelligent transportation systems, smart grids, and environmental monitoring. These large-scale projects require a significant number of IoT chips to enable seamless connectivity and data exchange between devices. IoT chips facilitate smart city initiatives by powering applications like traffic management, waste management, and public safety, contributing to the market's growth.

Enhanced Security Requirements

As IoT devices become integral parts of critical infrastructure and handle sensitive data, security is a paramount concern. This heightened security requirement is driving the demand for IoT chips with embedded security features. IoT chips are now equipped with hardware-based security modules, encryption engines, and secure boot mechanisms to protect data from cyber threats and unauthorized access. Security-conscious industries like healthcare, finance, and industrial automation are particularly reliant on secure IoT chips to safeguard sensitive information and maintain the integrity of their IoT ecosystems.

In conclusion, the global IoT chip market is being propelled by the proliferation of IoT devices, advancements in wireless connectivity, edge computing, AI integration, energy efficiency, smart infrastructure investments, and enhanced security requirements. These drivers collectively shape the evolving landscape of IoT chip development and adoption across various industries.

Government Policies are Likely to Propel the Market

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Data Privacy and Security Regulations

Data privacy and security regulations are central to the IoT chip market. Governments worldwide have been implementing policies to protect the privacy and security of IoT-generated data. These policies often require IoT devices, including those using IoT chips, to adhere to stringent security standards. For example, the General Data Protection Regulation (GDPR) in the European Union mandates data protection for IoT devices, placing accountability on manufacturers and service providers to secure IoT data. These regulations necessitate IoT chip manufacturers to embed robust security features, including encryption, authentication, and secure boot processes. Compliance with these policies is crucial to building trust in IoT devices and ensuring data privacy.

Spectrum Allocation and Wireless Standards

Government policies related to spectrum allocation and wireless standards play a significant role in the IoT chip market. Regulators allocate radio frequency spectrum for IoT communications, including technologies like Bluetooth, Wi-Fi, and cellular networks. Policies that promote the availability of unlicensed spectrum for IoT devices, such as the 2.4 GHz and 5 GHz bands for Wi-Fi and Bluetooth, encourage innovation and market growth. Governments may also influence the adoption of wireless standards for IoT, such as LPWAN (Low-Power Wide-Area Network) technologies like LoRaWAN and NB-IoT (Narrowband IoT). Policymakers can incentivize the deployment of these technologies by setting standards and promoting their use, which, in turn, drives demand for IoT chips compatible with these standards.

Certification and Compliance Standards

To ensure the reliability and interoperability of IoT devices, governments often establish certification and compliance standards. These policies require manufacturers to obtain certifications confirming that their IoT chips and devices meet specific quality, safety, and performance criteria. Compliance standards, such as those outlined in the Conformit? Europ?ene (CE) marking in the European Union, demonstrate adherence to regulatory requirements. Certification and compliance policies provide consumers with confidence in the quality and safety of IoT products and help foster a competitive marketplace for IoT chips and devices.

Research and Development Funding

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Government policies that allocate funding for IoT chip research and development (R&D) initiatives can stimulate innovation and competitiveness in the global market. Governments may provide grants, tax incentives, or subsidies to organizations engaged in IoT chip R&D, encouraging the development of cutting-edge technologies. Funding policies promote the creation of advanced IoT chips with improved performance, energy efficiency, and security, fostering the growth of the IoT ecosystem.

Import and Export Regulations

Import and export regulations influence the global IoT chip market, particularly for cross-border trade. Governments may impose tariffs, export controls, and trade restrictions on IoT chips and related technologies. Policies governing the import and export of IoT chips can affect the cost, availability, and global supply chain dynamics of these components. Policymakers often collaborate with industry stakeholders to strike a balance between supporting domestic IoT chip manufacturers and facilitating international trade and collaboration in the IoT sector.

IoT Cybersecurity Frameworks

Governments recognize the importance of IoT cybersecurity and are increasingly introducing policies related to cybersecurity frameworks and guidelines for IoT devices and chips. These frameworks outline best practices for manufacturers to follow to ensure the security of IoT devices throughout their lifecycle. By establishing cybersecurity policies, governments aim to reduce the risks associated with IoT devices, protect critical infrastructure, and enhance consumer trust in IoT technology. IoT chip manufacturers must align with these frameworks to create secure and resilient IoT solutions.

In conclusion, government policies related to data privacy, spectrum allocation, certification, R&D funding, import/export regulations, and IoT cybersecurity frameworks have a significant impact on the global IoT chip market. These policies help shape the regulatory environment, drive innovation, and promote the responsible and secure deployment of IoT technology worldwide.

Key Market Challenges

Security and Privacy Concerns

Security and privacy are paramount challenges in the global IoT chip market. As IoT

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devices become increasingly integrated into daily life and critical infrastructure, they store and transmit sensitive data, making them attractive targets for cyberattacks and privacy breaches. Several key security and privacy concerns include:

Vulnerabilities and Attacks: IoT devices, including those equipped with IoT chips, are vulnerable to various cyberattacks. Attackers may exploit weaknesses in device firmware, operating systems, or communication protocols to gain unauthorized access, launch Distributed Denial of Service (DDoS) attacks, or steal sensitive data.

Data Privacy: IoT devices often collect and transmit large volumes of personal and sensitive data. Inadequate data protection measures can lead to data breaches, exposing individuals to identity theft and other privacy violations. Stricter data privacy regulations, such as the General Data Protection Regulation (GDPR), place greater accountability on IoT device manufacturers to protect user data.

Device Management and Updates: Managing the security of a vast number of IoT devices can be challenging. Ensuring that devices receive timely security patches and updates to address newly discovered vulnerabilities is crucial. Many IoT devices lack robust mechanisms for automated updates, making them susceptible to attacks.

Supply Chain Vulnerabilities: The global nature of semiconductor supply chains introduces security risks. Counterfeit components, tampering, or compromised manufacturing processes can result in compromised IoT chips. Ensuring the integrity of the entire supply chain is a complex task.

Addressing these security and privacy challenges requires collaboration among IoT chip manufacturers, device makers, governments, and cybersecurity experts. Implementing robust security measures, encryption, and authentication protocols is essential to safeguard IoT devices and the data they handle.

Interoperability and Fragmentation

Interoperability and fragmentation present significant challenges in the global IoT chip market. The IoT ecosystem consists of a diverse array of devices, communication protocols, and platforms, resulting in fragmentation that can hinder seamless connectivity and interoperability. Key issues include:

Protocol Diversity: IoT devices use various communication protocols, such as Wi-Fi, Bluetooth, Zigbee, and LoRaWAN. Lack of standardization and compatibility among

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these protocols can impede device-to-device communication and integration into larger IoT networks.

Vendor Lock-In: Proprietary IoT solutions and platforms often lead to vendor lock-in, where devices and services from a single vendor are not easily interoperable with those from others. This limits flexibility for users and increases dependence on specific vendors.

Data Integration: IoT devices generate massive volumes of data. Ensuring that data from diverse devices can be integrated, analyzed, and acted upon cohesively is challenging. Incompatibilities in data formats and standards hinder effective data utilization.

Regulatory Compliance: IoT devices must adhere to various regional and industry-specific regulations. Navigating these regulatory landscapes can be complex for manufacturers aiming to offer IoT chips and devices globally.

Efforts to address interoperability and fragmentation challenges include the development of open standards, industry consortia, and initiatives promoting cross-vendor collaboration. Standardization bodies like the IoT Consortium (IoTC) and industry alliances work toward defining common protocols and frameworks to promote interoperability and simplify the IoT ecosystem. However, achieving widespread adoption of these standards remains an ongoing challenge in the highly dynamic IoT landscape.

Segmental Insights

Sensors Insights

The Sensors segment had the largest market share in 2022 & expected to maintain in the forecast period. Sensors are becoming smaller and more energy-efficient, enabling their integration into compact IoT devices. This trend supports the development of wearables, smart home gadgets, and portable medical devices. IoT devices often require multiple sensors to collect diverse data types. Multi-sensor integration enhances the capability of IoT devices to monitor and respond to various environmental conditions. Many IoT sensors are now equipped with wireless connectivity (e.g., Bluetooth, Wi-Fi, or LPWAN), allowing seamless data transmission to other devices or the cloud. Sensors equipped with processing capabilities enable edge analytics, where data is analyzed locally, reducing the need for constant data transmission to central

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servers. Energy-harvesting sensors are designed to derive power from their environment, reducing reliance on batteries and increasing device lifespan.

Banking, Financial Services & Insurance (BFSI) Insights

The Banking, Financial Services & Insurance segment had the largest market share in 2022 and is projected to experience rapid growth during the forecast period. The BFSI (Banking, Financial Services, and Insurance) sector has been a prominent adopter of IoT (Internet of Things) technology, and the use of IoT chips within this industry is a crucial aspect of its digital transformation. IoT chips in ATMs provide real-time data on cash levels, maintenance needs, and customer usage patterns. This data allows banks to optimize ATM deployment, reduce downtime, and ensure that ATMs are always stocked with cash. IoT sensors in bank branches track customer foot traffic and behavior. Banks can use this data to redesign branches for improved customer flow and offer personalized services based on individual preferences. IoT-enabled smart cards provide added security through features like biometric authentication and contactless payments, improving the convenience and security of banking transactions. IoT chips in surveillance cameras enable real-time video monitoring, facial recognition, and event-triggered alerts. This enhances physical security at bank branches, ATMs, and cash handling facilities. IoT chips are used to track high-value assets, such as vaults and cash-in-transit vehicles, ensuring their security and preventing theft. IoT sensors analyze transaction data in real-time, flagging suspicious activities and potential fraud. This proactive approach helps banks prevent fraudulent transactions and protect customer assets. IoT sensors monitor the condition of critical infrastructure components like HVAC systems and power generators. This data helps banks schedule maintenance and prevent unexpected breakdowns. IoT chips track the movement of banknotes, ensuring that cash is securely transported and delivered to branches and ATMs. IoT sensors in bank facilities optimize energy consumption by controlling lighting, heating, and cooling systems based on occupancy and environmental conditions. IoT-powered Point of Sale (POS) devices and mobile banking apps enable digital payments and financial services in remote and unbanked areas. IoT-enabled devices assist microfinance institutions in managing small loans and payments efficiently. IoT sensors in vehicles collect data used for usage-based insurance pricing, making insurance more affordable and accessible.

Regional Insights

North America had the largest market for IoT chips in 2022. The growth of the market in North America is being driven by the following factors:

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The increasing adoption of IoT devices in the automotive, healthcare, and manufacturing industries.

The presence of a large number of leading IoT chip manufacturers in the region.

The high level of investment in research and development in the region.

Europe had the second-largest market for IoT chips in 2022. The growth of the market in Europe is being driven by the following factors:

The increasing adoption of IoT devices in the healthcare and transportation industries.

The presence of a strong automotive industry in the region.

The increasing focus on environmental sustainability in the region.

Asia Pacific had the third-largest market for IoT chips in 2022. The growth of the market in Asia Pacific is being driven by the following factors:

The increasing adoption of IoT devices in the consumer electronics and industrial automation industries.

The presence of a large number of emerging economies in the region.

The increasing investment in research and development in the region.

Key Market Players

Qualcomm Technologies, Inc

Intel Corporation

MediaTek Inc

Samsung Electronics

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STMicroelectronics International N.V

NXP Semiconductors N.V.

Texas Instruments

Renesas Electronics Corporation

Infineon Technologies AG

Broadcom Inc.

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:

IoT Chip Market, By Hardware:

Processors

Sensors

Connectivity ICs

Memory Devices

Logic Devices Floor-standing

IoT Chip Market, By Application:

Healthcare

Consumer Electronics

Building Automation

Industrial

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Automotive and Transportation

Banking Financial Services & Insurance (BFSI)

Agriculture

Retail

Oil and Gas

IoT Chip Market, By Region:

North America

United States

Canada

Mexico

Europe

France

United Kingdom

Italy

Germany

Spain

Asia-Pacific

China

India

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Japan

Australia

South Korea

South America

Brazil

Argentina

Colombia

Middle East & Africa

South Africa

Saudi Arabia

UAE

Kuwait

Turkey

Egypt

Competitive Landscape

Company Profiles: Detailed analysis of the major companies present 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:

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Company Information

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

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Contents

1. PRODUCT OVERVIEW

2. RESEARCH METHODOLOGY

3. EXECUTIVE SUMMARY

4. VOICE OF CUSTOMER

5. GLOBAL IOT NODE AND GATEWAY MARKET OUTLOOK

5.1. Market Size & Forecast
  5.1.1. By Value
5.2. Market Share & Forecast
  5.2.1. By Hardware (Processor, Sensor, Wired, Wireless, Connectivity IC, And Memory Device),
  5.2.2. By End-User (BFSI, Healthcare, Wearable, Consumer Electronics, Agriculture, And Building & Automation)
  5.2.3. By Region
  5.2.4. By Company (2022)
5.3. Market Map

6. NORTH AMERICA IOT NODE AND GATEWAY MARKET OUTLOOK

6.1. Market Size & Forecast
  6.1.1. By Value
6.2. Market Share & Forecast
  6.2.1. By Hardware
  6.2.2. By End-User
  6.2.3. By Country
6.3. North America: Country Analysis
  6.3.1. United States IoT Node and Gateway Market Outlook
    6.3.1.1. Market Size & Forecast
      6.3.1.1.1. By Value
    6.3.1.2. Market Share & Forecast
      6.3.1.2.1. By Hardware
      6.3.1.2.2. By End-User
  6.3.2. Canada IoT Node and Gateway Market Outlook

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6.3.2.1. Market Size & Forecast
6.3.2.1.1. By Value
6.3.2.2. Market Share & Forecast
6.3.2.2.1. By Hardware
6.3.2.2.2. By End-User
6.3.3. Mexico IoT Node and Gateway Market Outlook
6.3.3.1. Market Size & Forecast
6.3.3.1.1. By Value
6.3.3.2. Market Share & Forecast
6.3.3.2.1. By Hardware
6.3.3.2.2. By End-User

7. EUROPE IOT NODE AND GATEWAY MARKET OUTLOOK

7.1. Market Size & Forecast
7.1.1. By Value
7.2. Market Share & Forecast
7.2.1. By Hardware
7.2.2. By End-User
7.2.3. By Country
7.3. Europe: Country Analysis
7.3.1. Germany IoT Node and Gateway Market Outlook
7.3.1.1. Market Size & Forecast
7.3.1.1.1. By Value
7.3.1.2. Market Share & Forecast
7.3.1.2.1. By Hardware
7.3.1.2.2. By End-User
7.3.2. United Kingdom IoT Node and Gateway Market Outlook
7.3.2.1. Market Size & Forecast
7.3.2.1.1. By Value
7.3.2.2. Market Share & Forecast
7.3.2.2.1. By Hardware
7.3.2.2.2. By End-User
7.3.3. Italy IoT Node and Gateway Market Outlook
7.3.3.1. Market Size & Forecast
7.3.3.1.1. By Value
7.3.3.2. Market Share & Forecast
7.3.3.2.1. By Hardware
7.3.3.2.2. By End-User

+357 96 030922
info@marketpublishers.com

7.3.4. France IoT Node and Gateway Market Outlook
7.3.4.1. Market Size & Forecast
7.3.4.1.1. By Value
7.3.4.2. Market Share & Forecast
7.3.4.2.1. By Hardware
7.3.4.2.2. By End-User
7.3.5. Spain IoT Node and Gateway Market Outlook
7.3.5.1. Market Size & Forecast
7.3.5.1.1. By Value
7.3.5.2. Market Share & Forecast
7.3.5.2.1. By Hardware
7.3.5.2.2. By End-User

8. ASIA-PACIFIC IOT NODE AND GATEWAY MARKET OUTLOOK

8.1. Market Size & Forecast
8.1.1. By Value
8.2. Market Share & Forecast
8.2.1. By Hardware
8.2.2. By End-User
8.2.3. By Country
8.3. Asia-Pacific: Country Analysis
8.3.1. China IoT Node and Gateway Market Outlook
8.3.1.1. Market Size & Forecast
8.3.1.1.1. By Value
8.3.1.2. Market Share & Forecast
8.3.1.2.1. By Hardware
8.3.1.2.2. By End-User
8.3.2. India IoT Node and Gateway Market Outlook
8.3.2.1. Market Size & Forecast
8.3.2.1.1. By Value
8.3.2.2. Market Share & Forecast
8.3.2.2.1. By Hardware
8.3.2.2.2. By End-User
8.3.3. Japan IoT Node and Gateway Market Outlook
8.3.3.1. Market Size & Forecast
8.3.3.1.1. By Value
8.3.3.2. Market Share & Forecast
8.3.3.2.1. By Hardware

+357 96 030922
info@marketpublishers.com

8.3.3.2.2. By End-User
8.3.4. South Korea IoT Node and Gateway Market Outlook
8.3.4.1. Market Size & Forecast
8.3.4.1.1. By Value
8.3.4.2. Market Share & Forecast
8.3.4.2.1. By Hardware
8.3.4.2.2. By End-User
8.3.5. Australia IoT Node and Gateway Market Outlook
8.3.5.1. Market Size & Forecast
8.3.5.1.1. By Value
8.3.5.2. Market Share & Forecast
8.3.5.2.1. By Hardware
8.3.5.2.2. By End-User

9. SOUTH AMERICA IOT NODE AND GATEWAY MARKET OUTLOOK

9.1. Market Size & Forecast
9.1.1. By Value
9.2. Market Share & Forecast
9.2.1. By Hardware
9.2.2. By End-User
9.2.3. By Country
9.3. South America: Country Analysis
9.3.1. Brazil IoT Node and Gateway Market Outlook
9.3.1.1. Market Size & Forecast
9.3.1.1.1. By Value
9.3.1.2. Market Share & Forecast
9.3.1.2.1. By Hardware
9.3.1.2.2. By End-User
9.3.2. Argentina IoT Node and Gateway Market Outlook
9.3.2.1. Market Size & Forecast
9.3.2.1.1. By Value
9.3.2.2. Market Share & Forecast
9.3.2.2.1. By Hardware
9.3.2.2.2. By End-User
9.3.3. Colombia IoT Node and Gateway Market Outlook
9.3.3.1. Market Size & Forecast
9.3.3.1.1. By Value
9.3.3.2. Market Share & Forecast

+357 96 030922
info@marketpublishers.com

9.3.3.2.1. By Hardware
9.3.3.2.2. By End-User

10. MIDDLE EAST AND AFRICA IOT NODE AND GATEWAY MARKET OUTLOOK

10.1. Market Size & Forecast
10.1.1. By Value
10.2. Market Share & Forecast
10.2.1. By Hardware
10.2.2. By End-User
10.2.3. By Country
10.3. MEA: Country Analysis
10.3.1. South Africa IoT Node and Gateway Market Outlook
10.3.1.1. Market Size & Forecast
10.3.1.1.1. By Value
10.3.1.2. Market Share & Forecast
10.3.1.2.1. By Hardware
10.3.1.2.2. By End-User
10.3.2. Saudi Arabia IoT Node and Gateway Market Outlook
10.3.2.1. Market Size & Forecast
10.3.2.1.1. By Value
10.3.2.2. Market Share & Forecast
10.3.2.2.1. By Hardware
10.3.2.2.2. By End-User
10.3.3. UAE IoT Node and Gateway Market Outlook
10.3.3.1. Market Size & Forecast
10.3.3.1.1. By Value
10.3.3.2. Market Share & Forecast
10.3.3.2.1. By Hardware
10.3.3.2.2. By End-User

11. MARKET DYNAMICS

12. MARKET TRENDS & DEVELOPMENTS

13. COMPANY PROFILES

13.1. Cisco Systems Inc
13.2. Huawei Technologies Co., Ltd

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13.3. Intel Corporation
13.4. IBM Corporation
13.5. Texas Instruments Incorporated
13.6. Advantech Co., Ltd.
13.7. Digi International Inc.
13.8. Schneider Electric SE
13.9. Mitsubishi Electric Corporation
13.10. Sierra Wireless Inc.

14. STRATEGIC RECOMMENDATIONS

15. ABOUT US & DISCLAIMER

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