

Smart Connected Devices Market - Global Industry Size, Share, Trends, Opportunity, and Forecast, Segmented By Product (Smartphones, Smart Watch, Smart Glasses, Wireless Printers, Smart Meters, Smart Cameras, Connected Bulbs, Smart Locks, Others), By End User (Industrial, Commercial, Residential), By Region, By Competition, 2018-2028

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Abstracts

Global Smart Connected Devices Market was valued at USD 17.08 billion in 2022 and is anticipated to project robust growth in the forecast period with a CAGR of 27.19% through 2028.

The Smart Connected Devices market encompasses a diverse range of products and technologies that integrate connectivity and intelligence into everyday objects, creating a network of interlinked devices capable of communication, data exchange, and automation. These devices include smartphones, tablets, smartwatches, smart TVs, smart home appliances, and various IoT (Internet of Things) devices.

Central to this market's definition is the concept of 'smartness.' Smart connected devices are equipped with sensors, processors, and communication interfaces, enabling them to collect and process data, connect to the internet, and interact with users or other devices. They often incorporate advanced technologies like artificial intelligence and wireless connectivity, enabling functionalities such as remote control, data analytics, and personalized user experiences.

This market is characterized by rapid innovation, driven by consumer demand for convenience, efficiency, and connectivity. As these devices continue to evolve and

become increasingly integrated into our daily lives, they offer diverse applications in areas like healthcare, automotive, industrial automation, and smart homes. The Smart Connected Devices market is a dynamic and transformative sector, shaping the way we live, work, and interact with the digital world.

Key Market Drivers

Increasing Consumer Demand for IoT Devices

The rapid proliferation of the Internet of Things (IoT) has been a significant driver of the global Smart Connected Devices market. IoT devices, which encompass a wide range of products from smart thermostats to wearable fitness trackers, have gained immense popularity among consumers. These devices offer convenience, automation, and enhanced connectivity, making them highly appealing to modern consumers.

Consumers are increasingly looking for ways to make their homes smarter and their lives more efficient. As a result, the demand for IoT devices that can connect to the internet and interact with other devices is on the rise. Smart speakers like Amazon Echo and Google Home, for example, are becoming central hubs for controlling various smart devices within the home. This surge in consumer demand for smart connected devices is a driving force behind the market's growth.

Advancements in Connectivity Technologies

The continuous advancements in connectivity technologies have played a pivotal role in driving the Smart Connected Devices market. Devices are now equipped with faster and more reliable connectivity options, such as 5G, Wi-Fi 6, and low-power wide-area networks (LPWANs). These technologies have expanded the capabilities of smart devices, enabling them to transmit and receive data more efficiently.

5G technology, in particular, is set to revolutionize the smart device landscape. Its high-speed, low-latency capabilities open up new possibilities for smart applications. For example, it allows for real-time remote monitoring, immersive augmented reality experiences, and seamless cloud computing on smart devices. As these connectivity technologies continue to evolve and become more accessible, the Smart Connected Devices market is expected to flourish.

Growing Industrial and Commercial Adoption

Smart connected devices are not limited to consumer applications. The industrial and commercial sectors have also seen a substantial increase in the adoption of these devices. Industries like manufacturing, healthcare, and agriculture are integrating smart devices into their operations to improve efficiency, automate tasks, and collect valuable data.

In manufacturing, for instance, smart sensors and connected machinery enable predictive maintenance, reducing downtime and increasing productivity. Healthcare facilities use IoT devices for remote patient monitoring and efficient asset management. The agricultural sector is benefitting from smart devices that aid in precision farming, optimizing crop yield and resource utilization.

As businesses recognize the potential for cost savings and operational improvements through smart connected devices, they are investing heavily in their adoption. This trend is expected to continue driving market growth in the coming years.

Increased Data Analytics Capabilities

The Smart Connected Devices market is being propelled forward by the growing capabilities of data analytics. Smart devices generate vast amounts of data, and businesses are keen to leverage this data to gain insights, improve their operations, and make informed decisions.

Advanced analytics tools, including artificial intelligence and machine learning, are used to process and analyze the data generated by these devices. This allows for predictive maintenance, personalized user experiences, and data-driven decision-making. For example, smart home devices can learn user preferences and adjust settings accordingly, while industrial sensors can predict equipment failures before they happen.

The increasing sophistication of data analytics and the ability to extract actionable insights from smart device data create a compelling value proposition for both consumers and businesses, driving further adoption of smart connected devices.

Security and Privacy Concerns

While the growth of the Smart Connected Devices market has been impressive, it has also raised concerns about security and privacy. As more devices become interconnected, there is an increased risk of cyberattacks and data breaches. Consumers and businesses are becoming more aware of these risks and are

demanding enhanced security features for their smart devices.

Manufacturers are responding by implementing robust security measures, such as encryption, authentication, and over-the-air updates. Regulatory bodies and industry standards are also evolving to address these concerns. For example, the General Data Protection Regulation (GDPR) in Europe and the California Consumer Privacy Act (CCPA) in the United States have put stricter requirements on data protection and privacy.

These concerns and regulatory developments are pushing the industry to prioritize security and privacy, ensuring that smart connected devices continue to be adopted with confidence.

Global Economic and Pandemic Influences

Global economic conditions and significant events, such as the COVID-19 pandemic, have had a substantial impact on the Smart Connected Devices market. The pandemic accelerated the adoption of remote work and digital services, which, in turn, increased the demand for smart devices, including laptops, tablets, and videoconferencing equipment.

Economic conditions, including stimulus packages and government incentives, have influenced consumer spending on technology, further driving the market. As governments invest in infrastructure, including 5G networks, it creates a favorable environment for the expansion of smart connected devices.

In conclusion, the global Smart Connected Devices market is being driven by a combination of factors, including increasing consumer demand, technological advancements, widespread industrial and commercial adoption, enhanced data analytics capabilities, growing security and privacy concerns, and economic and pandemic-related influences. These drivers, along with ongoing innovation and evolving user needs, are expected to continue shaping the market's trajectory in the years to come.

Government Policies are Likely to Propel the Market

Regulatory Framework for Data Privacy and Security

One of the foremost government policies that significantly impacts the global Smart

Connected Devices market is the establishment of a comprehensive regulatory framework for data privacy and security. As smart connected devices collect and transmit vast amounts of sensitive data, including personal information, there is a growing need to protect this data from breaches and misuse.

Countries around the world have introduced regulations to safeguard user data. For instance, the European Union's General Data Protection Regulation (GDPR) sets stringent rules for the collection, storage, and processing of personal data. In the United States, several states have enacted their own data privacy laws, and there are calls for federal legislation to create a unified approach.

These regulations necessitate that manufacturers and service providers adhere to strict data protection standards, including data encryption, user consent, and the right to be forgotten. Compliance with these policies is not only legally required but also contributes to building trust among consumers, which is crucial for the continued growth of the Smart Connected Devices market.

Spectrum Allocation and Wireless Communication Policies

The allocation of radio spectrum and wireless communication policies is another critical aspect of government regulation in the Smart Connected Devices market. Wireless connectivity is the backbone of smart devices, and governments play a significant role in ensuring that sufficient spectrum is available for the deployment of wireless networks.

Regulators allocate spectrum for various wireless technologies, including Wi-Fi, cellular networks, and emerging technologies like 5G. The availability of spectrum impacts the speed, reliability, and coverage of wireless connections, which in turn affects the performance of smart devices.

Governments also set policies related to wireless infrastructure deployment, such as the placement of cell towers and antennas. These policies can streamline or hinder the expansion of wireless networks, which has a direct impact on the adoption and use of smart connected devices.

Product Certification and Standards

To ensure the interoperability and safety of smart connected devices, governments often implement certification and standards policies. These policies require manufacturers to adhere to specific technical standards and obtain certifications before

their products can be sold in the market.

Certification processes can encompass a range of aspects, including electromagnetic compatibility, safety, and environmental considerations. By requiring devices to meet certain standards, governments aim to protect consumers from faulty or unsafe products and promote the smooth functioning of interconnected devices.

The adoption of international standards, such as those from organizations like the International Electrotechnical Commission (IEC) and the Institute of Electrical and Electronics Engineers (IEEE), helps facilitate global trade and innovation in the Smart Connected Devices market.

Trade and Import Regulations

Global Smart Connected Devices markets are highly dependent on international trade, making trade and import regulations a vital government policy. Governments set tariffs, import/export restrictions, and trade agreements that can significantly impact the cost, availability, and competitiveness of smart devices.

Trade policies can either facilitate or hinder the movement of devices and components across borders. Free trade agreements and tariff reductions can lower the costs of smart connected devices, making them more affordable for consumers. Conversely, trade disputes or protectionist measures can disrupt supply chains and increase prices.

Government policies that promote open and fair trade contribute to a healthier and more competitive Smart Connected Devices market, ensuring that consumers have access to a wide range of options at reasonable prices.

Research and Development Incentives

Many governments recognize the importance of innovation in the Smart Connected Devices sector and offer incentives and policies to support research and development (R&D). These incentives can take the form of tax breaks, grants, or funding for R&D activities related to smart device technologies.

By encouraging R&D, governments aim to spur technological advancements and maintain a competitive edge in the global market. They recognize that fostering innovation is not only beneficial for businesses but also for the broader economy and society.

R&D incentives have the potential to accelerate the development of new features and capabilities in smart devices, making them more attractive to consumers and businesses.

E-Waste Management and Recycling Policies

As the Smart Connected Devices market continues to grow, the disposal of electronic waste (e-waste) becomes a critical environmental concern. Government policies related to e-waste management and recycling are crucial in addressing the environmental impact of outdated or discarded devices.

Governments often implement regulations that require manufacturers to take responsibility for the recycling and disposal of their products. These policies promote the recycling of valuable materials and the proper disposal of hazardous components in electronic devices.

E-waste management policies contribute to the sustainability of the Smart Connected Devices market, reduce the environmental footprint, and ensure that discarded devices are handled responsibly.

In conclusion, government policies play a vital role in shaping the global Smart Connected Devices market. These policies encompass a wide range of areas, from data privacy and security regulations to spectrum allocation, product certification, trade policies, R&D incentives, and e-waste management. As governments adapt to the evolving landscape of smart devices and their impact on society, their policies will continue to influence the market's growth, innovation, and sustainability.

Key Market Challenges

Security and Privacy Concerns

Security and privacy challenges have emerged as a major obstacle in the global Smart Connected Devices market. As the number of smart devices in our homes, offices, and industries continues to grow, so do the vulnerabilities associated with these devices. Security breaches and privacy violations pose serious threats to both consumers and businesses, hindering the adoption and trust in smart connected devices.

One of the key security challenges is the susceptibility of smart devices to cyberattacks.

Many smart devices are connected to the internet, making them potential targets for hackers seeking to exploit vulnerabilities. Once compromised, these devices can be used as entry points to infiltrate networks and steal sensitive data. Malicious actors can gain unauthorized access to personal information, home security systems, and even connected medical devices, endangering the safety and privacy of users.

Furthermore, privacy concerns have been raised regarding the collection and use of personal data by smart devices. Many of these devices, including voice-activated smart speakers and wearable fitness trackers, continuously gather data on user behavior and preferences. The misuse or mishandling of this data by manufacturers or third-party companies can lead to privacy breaches, unauthorized data sharing, and invasive advertising practices.

In response to these challenges, governments and regulatory bodies are enacting data privacy laws, such as the General Data Protection Regulation (GDPR) in Europe and the California Consumer Privacy Act (CCPA) in the United States. Manufacturers are also improving security features, implementing encryption, and releasing software updates to address vulnerabilities. However, the ever-evolving nature of cyber threats and the vast array of interconnected devices make it a constant challenge to stay ahead of security and privacy risks.

To tackle these challenges effectively, stakeholders must continue to prioritize security and privacy in product design, collaborate on industry-wide security standards, and educate users about best practices for protecting their smart devices and data. Addressing these concerns is crucial to building and maintaining trust in the Smart Connected Devices market.

Interoperability and Fragmentation

Another significant challenge facing the global Smart Connected Devices market is the issue of interoperability and fragmentation. With a multitude of manufacturers and devices in the market, ensuring that smart devices can seamlessly communicate and work together can be a complex and sometimes elusive goal.

Interoperability refers to the ability of different devices and systems to understand and use each other's data. In the context of smart connected devices, it means that various devices from different manufacturers should be able to work together, share data, and perform coordinated tasks. For example, a smart thermostat should be able to communicate with a smart lighting system to optimize energy efficiency. However,

achieving this level of interoperability is often challenging due to a lack of common standards and protocols.

The problem of fragmentation arises from the diversity of devices and ecosystems in the market. Different manufacturers often use proprietary technologies and platforms, making it difficult for users to mix and match devices from various brands. This can create a scenario where users are locked into a particular ecosystem, limiting their options and flexibility.

Fragmentation also complicates the development of third-party applications and services that can integrate with smart devices. App developers must create separate versions for each platform or device, which increases development costs and slows down innovation in the Smart Connected Devices market.

In response to these challenges, industry groups and standards organizations are working on developing open standards and protocols to enhance interoperability. For example, initiatives like Project CHIP (Connected Home over IP) aim to create a universal standard for smart home devices. Companies are also forming partnerships and alliances to promote cross-compatibility among their devices.

Nevertheless, overcoming interoperability and fragmentation challenges remains an ongoing process. As the market continues to evolve, it will be essential for stakeholders to prioritize open standards and collaboration to ensure that the full potential of the Smart Connected Devices market can be realized. Efforts to address these challenges will benefit both consumers and the industry by enabling a more seamless and interconnected smart ecosystem.

Segmental Insights

Smartphones Insights

The Smartphones segment held the largest Market share in 2022. Smartphones offer a wide range of functionalities, making them highly versatile devices. They can perform tasks such as phone calls, text messaging, email, web browsing, social media access, navigation, multimedia consumption, and more. This versatility makes them indispensable in people's daily lives, acting as a central communication and information hub. Smartphones serve as central control hubs for managing various smart connected devices. Through dedicated mobile apps, users can remotely control and monitor their smart home appliances, security systems, wearable devices, and even their vehicles.

This capability enhances user convenience and efficiency. There are billions of smartphone users worldwide, and this user base continues to grow. The sheer number of smartphone users creates a significant market for apps and services, further driving innovation and expansion in the Smart Connected Devices market. Smartphones are equipped with various connectivity options, including Wi-Fi, Bluetooth, and cellular data, enabling seamless integration with other smart devices. They play a pivotal role in building an Internet of Things (IoT) ecosystem by connecting and controlling a wide range of IoT devices. The smartphone industry is highly competitive, driving constant innovation. Manufacturers regularly introduce new features, hardware enhancements, and software updates to attract consumers. These innovations include improvements in camera technology, processing power, battery life, and connectivity features. Smartphones offer a user-friendly and intuitive interface. This ease of use has contributed to their widespread adoption, as consumers of all age groups and technical backgrounds can easily navigate and interact with these devices. Smartphones come with app stores that offer a vast array of applications and services. Users can customize their smartphones by downloading apps that cater to their specific needs, from productivity tools to entertainment and fitness apps. This ecosystem encourages user engagement and further solidifies smartphones as indispensable devices. Many consumers upgrade their smartphones every few years to access the latest features and technologies. This frequent turnover cycle ensures that manufacturers continually introduce new models with advanced capabilities. Smartphones are accessible to a global audience, making them an inclusive technology. The ability to connect people from different regions and cultures has made them a universal device. The smartphone industry has a significant economic impact, generating employment, contributing to GDP, and fostering innovation in both hardware and software sectors.

Residential Insights

The Residential segment held the largest Market share in 2022. Residential consumers have shown a strong and consistent demand for smart connected devices. These devices offer convenience, security, and energy efficiency, all of which are highly appealing to homeowners. Consumers have readily embraced technologies that enhance their daily lives, from smart thermostats that optimize energy usage to voice-activated smart speakers that control various aspects of the home.

The residential sector encompasses a wide variety of smart connected devices, catering to diverse consumer needs and preferences. These devices include smart thermostats, security cameras, smart lighting, smart locks, voice-activated assistants, and entertainment systems. The availability of these devices provides homeowners with

options to customize their smart homes according to their specific requirements.

Many homeowners are building comprehensive Internet of Things (IoT) ecosystems within their residences. These ecosystems involve the interconnection of various smart devices, creating a network where devices can communicate and collaborate. This interconnectedness often revolves around a central hub, such as a smartphone or a smart speaker, which allows users to control and monitor multiple devices from a single interface.

The adoption of smart connected devices in the residential sector is often easier and more straightforward than in commercial or industrial settings. Residential users don't typically encounter the same regulatory and security complexities that commercial and industrial users may face. The plug-and-play nature of many smart home devices, along with user-friendly apps and interfaces, contributes to the ease of adoption in the residential sector.

The continuous evolution and improvement of smart home technology, along with competitive pricing, have made smart connected devices increasingly accessible to a broad range of consumers. Advancements in hardware and software, coupled with affordable pricing, have encouraged homeowners to invest in these devices, thereby driving their dominance in the market.

It's important to note that the market dynamics in the Smart Connected Devices sector can change over time. While the residential sector has been leading the market in recent years, the commercial and industrial sectors are also experiencing substantial growth in smart connected device adoption. Commercial and industrial applications encompass areas like manufacturing, healthcare, agriculture, and more, where IoT and smart devices are used for process optimization, automation, and data analytics.

.Regional Insights

North America is the largest regional market for smart connected devices, accounting for a significant share of the overall market revenue. The region is home to a number of leading smart connected devices manufacturers, such as Apple, Google, and Amazon. North America is also a major adopter of new technologies, such as the Internet of Things (IoT) and artificial intelligence (AI). These factors are driving the growth of the smart connected devices market in the region.

Europe is the second-largest regional market for smart connected devices. The region

is home to a number of leading smart connected devices manufacturers, such as Samsung, Sony, and LG Electronics. Europe is also a major adopter of new technologies, such as the IoT and AI. The growing demand for smart homes and smart cities in the region is also driving the growth of the smart connected devices market.

Asia Pacific is the fastest-growing regional market for smart connected devices. The region is home to a number of emerging markets, such as China, India, and Indonesia, which are experiencing rapid economic growth and urbanization. This is leading to a growing demand for smart connected devices in the region. Additionally, the governments of a number of countries in the Asia Pacific region are investing in smart city initiatives, which is further driving the growth of the smart connected devices market.

Key Market Players

Samsung Electronics Co., Ltd.

Apple Inc.

Huawei Technologies Co., Ltd.

Xiaomi Corporation

Sony Corporation

LG Electronics Inc.

Panasonic Corporation

Koninklijke Philips N.V.

Robert Bosch GmbH

Siemens AG

Report Scope:

In this report, the Global Smart Connected Devices Market has been segmented into the following categories, in addition to the industry trends which have also been detailed

below:

Smart Connected Devices Market, By Product:

Smartphones

Smart Watch

Smart Glasses

Wireless Printers

Smart Meters

Smart Cameras

Connected Bulbs

Smart Locks

Others

Smart Connected Devices Market, By End User:

Industrial

Commercial

Residential

Smart Connected Devices Market, By Region:

North America

United States

Canada

Mexico

Europe

France

United Kingdom

Italy

Germany

Spain

Asia-Pacific

China

India

Japan

Australia

South Korea

South America

Brazil

Argentina

Colombia

Middle East & Africa

South Africa

Saudi Arabia

UAE

Kuwait

Turkey

Competitive Landscape

Company Profiles: Detailed analysis of the major companies present in the Global Smart Connected Devices Market.

Available Customizations:

Global Smart Connected Devices 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).

Contents

1. PRODUCT OVERVIEW

- 1.1. Market Definition
- 1.2. Scope of the Market
 - 1.2.1. Markets Covered
 - 1.2.2. Years Considered for Study
- 1.3. Key Market Segmentations

2. RESEARCH METHODOLOGY

- 2.1. Objective of the Study
- 2.2. Baseline Methodology
- 2.3. Formulation of the Scope
- 2.4. Assumptions and Limitations
- 2.5. Sources of Research
 - 2.5.1. Secondary Research
 - 2.5.2. Primary Research
- 2.6. Approach for the Market Study
 - 2.6.1. The Bottom-Up Approach
 - 2.6.2. The Top-Down Approach
- 2.7. Methodology Followed for Calculation of Market Size & Market Shares
- 2.8. Forecasting Methodology
 - 2.8.1. Data Triangulation & Validation

3. EXECUTIVE SUMMARY

4. VOICE OF CUSTOMER

5. GLOBAL SMART CONNECTED DEVICES MARKET OUTLOOK

- 5.1. Market Size & Forecast
 - 5.1.1. By Value
- 5.2. Market Share & Forecast
 - 5.2.1. By Product (Smartphones, Smart Watch, Smart Glasses, Wireless Printers, Smart Meters, Smart Cameras, Connected Bulbs, Smart Locks, Others),

- 5.2.2. By End User (Industrial, Commercial, Residential)
- 5.2.3. By Region
- 5.2.4. By Company (2022)
- 5.3. Market Map

6. NORTH AMERICA SMART CONNECTED DEVICES MARKET OUTLOOK

- 6.1. Market Size & Forecast
 - 6.1.1. By Value
- 6.2. Market Share & Forecast
 - 6.2.1. By Product
 - 6.2.2. By End User
 - 6.2.3. By Country
- 6.3. North America: Country Analysis
 - 6.3.1. United States Smart Connected Devices 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 Product
 - 6.3.1.2.2. By End User
 - 6.3.2. Canada Smart Connected Devices Market Outlook
 - 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 Product
 - 6.3.2.2.2. By End User
 - 6.3.3. Mexico Smart Connected Devices 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 Product
 - 6.3.3.2.2. By End User

7. EUROPE SMART CONNECTED DEVICES MARKET OUTLOOK

- 7.1. Market Size & Forecast
 - 7.1.1. By Value
- 7.2. Market Share & Forecast
 - 7.2.1. By Product

7.2.2. By End User

7.2.3. By Country

7.3. Europe: Country Analysis

7.3.1. Germany Smart Connected Devices 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 Product

7.3.1.2.2. By End User

7.3.2. United Kingdom Smart Connected Devices 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 Product

7.3.2.2.2. By End User

7.3.3. Italy Smart Connected Devices 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 Product

7.3.3.2.2. By End User

7.3.4. France Smart Connected Devices 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 Product

7.3.4.2.2. By End User

7.3.5. Spain Smart Connected Devices 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 Product

7.3.5.2.2. By End User

8. ASIA-PACIFIC SMART CONNECTED DEVICES MARKET OUTLOOK

8.1. Market Size & Forecast

8.1.1. By Value

8.2. Market Share & Forecast

- 8.2.1. By Product
- 8.2.2. By End User
- 8.2.3. By Country
- 8.3. Asia-Pacific: Country Analysis
 - 8.3.1. China Smart Connected Devices 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 Product
 - 8.3.1.2.2. By End User
 - 8.3.2. India Smart Connected Devices 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 Product
 - 8.3.2.2.2. By End User
 - 8.3.3. Japan Smart Connected Devices 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 Product
 - 8.3.3.2.2. By End User
 - 8.3.4. South Korea Smart Connected Devices 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 Product
 - 8.3.4.2.2. By End User
 - 8.3.5. Australia Smart Connected Devices 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 Product
 - 8.3.5.2.2. By End User

9. SOUTH AMERICA SMART CONNECTED DEVICES MARKET OUTLOOK

- 9.1. Market Size & Forecast
 - 9.1.1. By Value

9.2. Market Share & Forecast

9.2.1. By Product

9.2.2. By End User

9.2.3. By Country

9.3. South America: Country Analysis

9.3.1. Brazil Smart Connected Devices 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 Product

9.3.1.2.2. By End User

9.3.2. Argentina Smart Connected Devices 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 Product

9.3.2.2.2. By End User

9.3.3. Colombia Smart Connected Devices Market Outlook

9.3.3.1. Market Size & Forecast

9.3.3.1.1. By Value

9.3.3.2. Market Share & Forecast

9.3.3.2.1. By Product

9.3.3.2.2. By End User

10. MIDDLE EAST AND AFRICA SMART CONNECTED DEVICES MARKET OUTLOOK

10.1. Market Size & Forecast

10.1.1. By Value

10.2. Market Share & Forecast

10.2.1. By Product

10.2.2. By End User

10.2.3. By Country

10.3. Middle East and Africa: Country Analysis

10.3.1. South Africa Smart Connected Devices 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 Product

- 10.3.1.2.2. By End User
- 10.3.2. Saudi Arabia Smart Connected Devices 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 Product
 - 10.3.2.2.2. By End User
- 10.3.3. UAE Smart Connected Devices 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 Product
 - 10.3.3.2.2. By End User
- 10.3.4. Kuwait Smart Connected Devices Market Outlook
 - 10.3.4.1. Market Size & Forecast
 - 10.3.4.1.1. By Value
 - 10.3.4.2. Market Share & Forecast
 - 10.3.4.2.1. By Product
 - 10.3.4.2.2. By End User
- 10.3.5. Turkey Smart Connected Devices Market Outlook
 - 10.3.5.1. Market Size & Forecast
 - 10.3.5.1.1. By Value
 - 10.3.5.2. Market Share & Forecast
 - 10.3.5.2.1. By Product
 - 10.3.5.2.2. By End User

11. MARKET DYNAMICS

- 11.1. Drivers
- 11.2. Challenges

12. MARKET TRENDS & DEVELOPMENTS

13. COMPANY PROFILES

- 13.1. Samsung Electronics Co., Ltd.
 - 13.1.1. Business Overview
 - 13.1.2. Key Revenue and Financials

- 13.1.3. Recent Developments
- 13.1.4. Key Personnel/Key Contact Person
- 13.1.5. Key Product/Services Offered
- 13.2. Apple Inc.
 - 13.2.1. Business Overview
 - 13.2.2. Key Revenue and Financials
 - 13.2.3. Recent Developments
 - 13.2.4. Key Personnel/Key Contact Person
 - 13.2.5. Key Product/Services Offered
- 13.3. Huawei Technologies Co., Ltd.
 - 13.3.1. Business Overview
 - 13.3.2. Key Revenue and Financials
 - 13.3.3. Recent Developments
 - 13.3.4. Key Personnel/Key Contact Person
 - 13.3.5. Key Product/Services Offered
- 13.4. Xiaomi Corporation
 - 13.4.1. Business Overview
 - 13.4.2. Key Revenue and Financials
 - 13.4.3. Recent Developments
 - 13.4.4. Key Personnel/Key Contact Person
 - 13.4.5. Key Product/Services Offered
- 13.5. Sony Corporation
 - 13.5.1. Business Overview
 - 13.5.2. Key Revenue and Financials
 - 13.5.3. Recent Developments
 - 13.5.4. Key Personnel/Key Contact Person
 - 13.5.5. Key Product/Services Offered
- 13.6. LG Electronics Inc.
 - 13.6.1. Business Overview
 - 13.6.2. Key Revenue and Financials
 - 13.6.3. Recent Developments
 - 13.6.4. Key Personnel/Key Contact Person
 - 13.6.5. Key Product/Services Offered
- 13.7. Panasonic Corporation
 - 13.7.1. Business Overview
 - 13.7.2. Key Revenue and Financials
 - 13.7.3. Recent Developments
 - 13.7.4. Key Personnel/Key Contact Person
 - 13.7.5. Key Product/Services Offered

13.8. Koninklijke Philips N.V.

13.8.1. Business Overview

13.8.2. Key Revenue and Financials

13.8.3. Recent Developments

13.8.4. Key Personnel/Key Contact Person

13.8.5. Key Product/Services Offered

13.9. Robert Bosch GmbH

13.9.1. Business Overview

13.9.2. Key Revenue and Financials

13.9.3. Recent Developments

13.9.4. Key Personnel/Key Contact Person

13.9.5. Key Product/Services Offered

13.10. Siemens AG

13.10.1. Business Overview

13.10.2. Key Revenue and Financials

13.10.3. Recent Developments

13.10.4. Key Personnel/Key Contact Person

13.10.5. Key Product/Services Offered

14. STRATEGIC RECOMMENDATIONS

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