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IoT Market Forecast to 2030 - Global Analysis by Component [Hardware, Software (Device Management, Application Management, Data Management, and Network Management), and Services], Enterprise Size (Large Enterprises and SMEs), and Application (Building & Automation, Smart Energy & Utilities, Smart Manufacturing, Connected Logistics, Banking & Financial Services, Aerospace & Defense, and Others)

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Abstracts

The IoT market size is expected to grow from US$ 483.28 billion in 2022 to US$ 3,967.99 billion by 2030; it is estimated to grow at a CAGR of 30.6% during the forecast period.

According to the International Trade Administration (ITA), retail consumer goods e-commerce holds 18% share of the total global retail sales in 2020 and is expected to reach ~22% by 2024. The e-commerce industry is growing rapidly, and retailers are utilizing IoT solutions to improve their operational efficiency, enhance customer experience, and gain a competitive advantage. Also, an increase in customer demand for a better shopping experience, a reduction in the cost of IoT-based sensors and connectivity, and a surge in the adoption of smart payment solutions are among the major factors driving the adoption of IoT solutions in the e-commerce industry. Moreover, retailers in this industry utilize IoT to avoid security pitfalls and are deploying IoT-enabled systems that can combat the jamming of network services in their warehouses and stores. As IoT plays a significant role in process automation and enhancement of operational efficiency of retail stores, there is an increasing demand for

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IoT in surveillance and security, supply chain optimization, energy optimization, inventory optimization, and workforce management. For instance, Walgreens, a US-based retailer, has been experimenting with IoT-enabled displays on refrigerator doors that utilize face detection technology to show ads based on approximate age and gender. Moreover, several retailers use customizable IoT-connected dashboards for customer feedback and use the insights to enhance customer experiences. Therefore, with the growing e-commerce industry, the demand for IoT solutions is expected to rise, which is likely to fuel the IoT software market during the forecast period.

The COVID-19 pandemic had a diverse impact on various European nations. Italy and France witnessed a spike in COVID-19 cases, leading to stringent and long-term lockdowns and social isolation. As people increased the usage of smart wearables, smart cameras, and telecommunications devices, including IoT-based devices, the need to secure smart homes and smart buildings from cybersecurity risks increased across the region during the pandemic. Moreover, the adoption and investment in IoT technology continued to rise in industries such as retail, where IoT supports growing multichannel retail strategies and provides a seamless consumer experience through shopping channels. Als0, digitalization increased the production processes and enhanced supply chains across the electrical utility, mining, agriculture, oil & gas, and transportation industries in the region. The rise in demand for automation to avoid the involvement of a full-capacity workforce fueled the adoption of IoT technology across Europe. Hence, the COVID-19 pandemic positively influenced the Europe IoT market.

Europe dominated the IoT market with the largest share in 2022. The demand for IoT solutions is increasing across Europe, especially in countries such as Germany, the UK, and France. A surge in inclination toward cloud-based IoT software, the need for improved supply chain and customer relationship management operations, and advancements in industrial-grade digital products are the major factors contributing to the growth of the IoT market across the region. The manufacturing, healthcare, and BFSI sectors are the key contributors to the IoT market in Europe.

Governments of European countries are taking various initiatives to bolster the adoption of IoT and edge computing. In March 2021, the European Commission conducted a Fireside Chat workshop to mobilize and connect expert stakeholders from the agriculture, automotive, aerospace, construction machinery, home, and industrial automation verticals, among others. The aim of this workshop was to design a strategy for the future progress of IoT and edge computing in Europe with a market window over five years. In addition, the European Union (EU) hosts various funding programs for next-generation IoT and edge computing. For example, through Horizon Europe, the EU

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will contribute more than US$ 169.86 million (EUR 150 million) in research and innovation (R&I) under its 2021 “World Leading Data and Computing Technologies: From Cloud to Edge to IoT for European Data.’’ The program will support the development and deployment of next-generation computing components, systems, and platforms. Thus, such initiatives by the EU would fuel the growth of the IoT market in Europe in the coming years.

IoT enables companies to automate processes; reduce labor costs; and provide real-time insight into business processes and the performance of machines, supply chains, and logistics operations. Moreover, according to the Microsoft IoT Signals 2021 report, 99% of organizations surveyed in Europe are aware of AI technology, 98.3% of edge computing, and 89.2% of digital twins. Further, ~88% of German companies are most likely to adopt AI technology, and ~68% use AI in their IoT solutions. Therefore, the use of AI and digital twins bolsters the adoption of IoT, the propelling the IoT market growth in Europe.

Microsoft Corporation; Hewlett Packard Enterprise Development LP; SAS Institute Inc.; VMware, Inc.; Google, LLC; Oracle Corporation; Cisco Systems, Inc.; SAP SE; IBM Corporation; and Qualcomm Technologies, Inc are among the key IoT market players profiled in this market study. Several other essential IoT market players were analyzed for a holistic view of the market and its ecosystem.

The overall IoT market size has been derived using both primary and secondary sources. To begin the IoT market research process, exhaustive secondary research has been conducted using internal and external sources to obtain qualitative and quantitative information related to the IoT market. The process also serves the purpose of obtaining an overview and market forecast of the IoT market growth with respect to all market segments. Also, multiple primary interviews have been conducted with industry participants and commentators to validate the data and gain more analytical insights about the topic. Participants of this process include industry experts such as VPs, business development managers, market intelligence managers, and national sales managers—along with external consultants such as valuation experts, research analysts, and key opinion leaders—specializing in the IoT market.

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