

IoT Roaming Market Size, Share, and Outlook, 2025 Report- By Type (LPWANs, Cellular, Zigbee, Bluetooth and BLE, Others), By Application (Manufacturing, Healthcare, IT and ITES, Utilities, Others), By Platform (CMP, AEP, PES), By Device (Smart Mobiles, Smart Refrigerators, Smartwatches, Smart Fire Alarms, Smart Door Locks, Others), By Deployment (Cloud-based, On-premises), By End-User (Public, Private), 2018-2032

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Abstracts

IoT Roaming Market Outlook

The IoT Roaming Market size is expected to register a growth rate of 17.6% during the forecast period from \$3.44 Billion in 2025 to \$10.7 Billion in 2032. The IoT Roaming market is a thriving business that is poised to keep growing and presents potential growth opportunities for companies across the industry value chain.

The comprehensive market research report presents 12-year historic and forecast data on IoT Roaming segments across 22 countries from 2021 to 2032. Key segments in the report include By Type (LPWANs, Cellular, Zigbee, Bluetooth and BLE, Others), By Application (Manufacturing, Healthcare, IT and ITES, Utilities, Others), By Platform (CMP, AEP, PES), By Device (Smart Mobiles, Smart Refrigerators, Smartwatches, Smart Fire Alarms, Smart Door Locks, Others), By Deployment (Cloud-based, On-premises), By End-User (Public, Private). Over 70 tables and charts showcase findings from our latest survey report on IoT Roaming markets.

IoT Roaming Market Insights, 2025

The IoT Roaming Market is gaining traction as connected devices such as smart meters, autonomous vehicles, and industrial sensors require seamless connectivity across multiple telecom networks. Companies like Vodafone IoT, AT&T, and Telefonica offer global roaming solutions with embedded SIM (eSIM) technology, network slicing, and real-time data analytics to ensure uninterrupted service for IoT devices worldwide. The adoption of 5G, LPWAN (Low Power Wide Area Network), and satellite-based IoT connectivity is further enhancing the market's capabilities. However, data transmission costs, security vulnerabilities in cross-border communications, and regulatory compliance with data sovereignty laws remain major challenges. Additionally, the rise of private LTE and decentralized IoT networks is shaping the future of global IoT roaming by providing more cost-effective and secure connectivity solutions for enterprises.

Five Trends that will define global IoT Roaming market in 2025 and Beyond

A closer look at the multi-million market for IoT Roaming identifies rapidly shifting consumer preferences across categories. By focusing on growth and resilience, leading IoT Roaming companies are prioritizing their investments across categories, markets, and geographies. The report analyses the most important market trends shaping the new landscape to support better decisions for the long and short-term future. The impact of tariffs by the US administration also significantly impact the profitability of IoT Roaming vendors.

What are the biggest opportunities for growth in the IoT Roaming industry?

The IoT Roaming sector demonstrated remarkable resilience over the past year across developed and developing economies. Further, the market presents significant opportunities to leverage the existing momentum towards actions by 2032. On the other hand, recent macroeconomic developments including rising inflation and supply chain disruptions are putting pressure on companies. The chapter assists users to identify growth avenues and address business challenges to make informed commercial decisions with unique insights, data forecasts, and in-depth market analyses.

IoT Roaming Market Segment Insights

The IoT Roaming industry presents strong offers across categories. The analytical report offers forecasts of IoT Roaming industry performance across segments and countries. Key segments in the industry include%li%By Type (LPWANs, Cellular,

Zigbee, Bluetooth and BLE, Others), By Application (Manufacturing, Healthcare, IT and ITES, Utilities, Others), By Platform (CMP, AEP, PES), By Device (Smart Mobiles, Smart Refrigerators, Smartwatches, Smart Fire Alarms, Smart Door Locks, Others), By Deployment (Cloud-based, On-premises), By End-User (Public, Private). The largest types, applications, and sales channels, fastest growing segments, and the key factors driving each of the categories are included in the report.

Forecasts of each segment across five regions are provided from 2021 through 2032 for Asia Pacific, North America, Europe, South America, Middle East, and African regions. In addition, IoT Roaming market size outlook is provided for 22 countries across these regions.

Market Value Chain

The chapter identifies potential companies and their operations across the global IoT Roaming industry ecosystem. It assists decision-makers in evaluating global IoT Roaming market fundamentals, market dynamics, and disruptive trends across the value chain segments.

Scenario Analysis and Forecasts

Strategic decision-making in the IoT Roaming industry is multi-faceted with the increased need for planning across scenarios. The report provides forecasts across three case scenarios%li%low growth, reference case, and high growth cases.

Asia Pacific IoT Roaming Market Analysis%li%A Promising Growth Arena for Business Expansion

As companies increasingly expand across promising Asia Pacific markets with over 4.5 billion population, the medium-to-long-term future remains robust. The presence of the fastest-growing economies such as China, India, Thailand, Indonesia, and Vietnam coupled with strengthening middle-class populations and rising disposable incomes drive the market. In particular, China and India are witnessing rapid shifts in consumer purchasing behavior. China is recovering steadily with optimistic forecasts for 2025. Further, Japanese and South Korean markets remain stable with most companies focusing on new product launches and diversification of sales channels.

The State of Europe IoT Roaming Industry 2025%li%Focus on Accelerating Competitiveness

As companies opt for an integrated agenda for competitiveness, the year 2025 presents optimistic scenarios for companies across the ecosystem. With signs of economic recovery across markets, companies are increasing their investments. Europe is one of the largest markets for IoT Roaming with demand from both Western Europe and Eastern European regions increasing over the medium to long-term future. Increasing omnichannel shopping amidst robust consumer demand for value purchases shapes the market outlook. The report analyses the key IoT Roaming market drivers and opportunities across Germany, France, the United Kingdom, Spain, Italy, Russia, and other Europe.

The US IoT Roaming market Insights%li%Vendors are exploring new opportunities within the US IoT Roaming industry.

Easing inflation coupled with strengthening consumer sentiment is encouraging aggressive actions from the US IoT Roaming companies. Market players consistently focusing on innovation and pursuing new ways to create value are set to excel in 2025. In addition, the Canadian and Mexican markets offer lucrative growth pockets for manufacturers and vendors. Focus on private-brand offerings and promotions, diversified sales channels, expansion into niche segments, adoption of advanced technologies, and sustainability are widely observed across the North American IoT Roaming market.

Latin American IoT Roaming market outlook rebounds in line with economic growth.

Underlying demand remains higher among urban consumers with an optimistic economic outlook across Brazil, Argentina, Chile, and other South and Central American countries. Increased consumer spending has been reported in Q1 -2025 and the prospects remain strong for rest of 2025. Aggressive ecosystem moves to create new sources of income are widely observed across markets in the region. Marketing activities focused on customer insights, operations, and support functions are quickly gaining business growth in the region.

Middle East and Africa IoT Roaming Markets%li%New Opportunities for Companies Harnessing Diversity

Rapid growth in burgeoning urban locations coupled with a young and fast-growing population base is attracting new investments in the Middle East and African IoT Roaming markets. Designing expansion and marketing strategies to cater to the local

consumer base supports the market prospects. In addition to Nigeria, Algeria, South Africa, and other markets, steady growth markets in Ethiopia, Rwanda, Ghana, Tanzania, the Democratic Republic of Congo, and others present significant prospects for companies. On the other hand, Middle Eastern IoT Roaming markets including the UAE, Saudi Arabia, Qatar, and Oman continue to offer lucrative pockets of growth.

Competitive Landscape%li%How IoT Roaming companies outcompete in 2025?

The ability to respond quickly to evolving consumer preferences and adapt businesses to niche consumer segments remains a key growth factor. The report identifies the leading companies in the industry and provides their revenue for 2024. The market shares of each company are also included in the report. Further, business profiles, SWOT analysis, and financial analysis of each company are provided in detail. Key companies analyzed in the report include AT&T Mobility, BICS, Fon, Genasys, KnowRoaming, MOBILE TORNADO GROUP, MTX connect, Spearline, Tata Communications, UROS – Uni-fi Roaming.

IoT Roaming Market Segmentation

By Type

LPWANs

Cellular

Zigbee

Bluetooth and BLE

Others

By Application

Manufacturing

Healthcare

IT and ITES

Utilities

Others

By Platform

CMP

AEP

PES

By Device

Smart Mobiles

Smart Refrigerators

Smartwatches

Smart Fire Alarms

Smart Door Locks

Others

By Deployment

Cloud-based

On-premises

By End-User

Public

Private

Leading Companies

AT&T Mobility

BICS

Fon

Genasys

KnowRoaming

MOBILE TORNADO GROUP

MTX connect

Spearline

Tata Communications

UROS – Uni-fi Roaming

Reasons to Buy the report

Make informed decisions through long and short-term forecasts across 22 countries and segments.

Evaluate market fundamentals, dynamics, and disrupting trends set to shape 2025 and beyond.

Gain a clear understanding of the competitive landscape, with product portfolio and growth strategies.

Get an integrated understanding of the entire market ecosystem and companies.

Stay ahead of the competition through plans for growth in a changing environment for your geographic expansion.

Assess the impact of advanced technologies and identify growth opportunities based on actionable data and insights.

Get free Excel spreadsheet and PPT versions along with the report PDF.

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By Type

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Cellular

Zigbee

Bluetooth and BLE

Others

By Application

Manufacturing

Healthcare

IT and ITES

Utilities

Others

By Platform

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AEP

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Smart Refrigerators

Smartwatches

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Others

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AT&T Mobility

BICS

Fon

Genasys

KnowRoaming

MOBILE TORNADO GROUP

MTX connect

Spearline

Tata Communications

UROS – Uni-fi Roaming

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