

Shaping the IoT Future

Cellular Modules for IoT, 2017.

Report Overview

Contents.

Executive Summary

- ⦿ This report and forecast includes the following:
 - Global market size by revenue and shipments to end 2017 indicative based on H1 2017 actuals.
 - Indicative full year 2017 revenues and shipments.
 - Revenue and shipment breakdown by module type (2G/3G/LTE).
 - Forecasts on the impact of LTE-M (Low Power) technologies.
 - Price trends for each module type.
 - Profiles of the major suppliers.
 - Growth forecasts to 2021 for each module type, including expectation on the introduction of 5G toward the end of this period.
- ⦿ Some key points from the report.
- ⦿ Adjustments made from 2015 report

Companies Surveyed

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- ⦿ Telit.
- ⦿ Gemalto.
- ⦿ SIMCom.
- ⦿ U-Blox.
- ⦿ Quectel.
- ⦿ Huawei.

Forecasts

- ⦿ Breakdown of Modules Market 2G, 3G, 4G, 4G LTE Power, 5G.
- ⦿ Market trends to date.
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Conclusions



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It is no exaggeration to say that cellular modules are a cornerstone of the IoT market and a significant indicator of its health and vitality.

Beecham Research has been following the IoT cellular modules market since our first forecast report in 2002, when total annual shipments were a fraction of today's level. At that time, 2G GPRS was the only game in town.

Since then, the market has seen steady and quite spectacular growth, coupled with rapid technology change and steep annual price declines. These trends are continuing today with significant ongoing changes in the market due to:

- The current sunset of 2G, particularly rapid in North America.
- The anticipated sunset of 3G, potentially at a faster rate than 2G before it.
- The rise of 4G, serving both high and low data rates.
- The prospects for 5G
- The development of new LPWA technologies as potential competitors.
- The entry of new competitors into the market, in particular from China.
- The growing importance of IoT platforms as a basis for IoT solutions.

As a result, the cellular modules market is undergoing its biggest changes since the early days of M2M. Customer demand is driving increasing speed and application complexity at the high end of the market, while at the low end the demand for simplicity, low power consumption and low price is greatly impacting on sales volumes. The market is more volatile than ever before and requires detailed research and analysis to identify the most likely outcomes. This document reports on the following key issues:

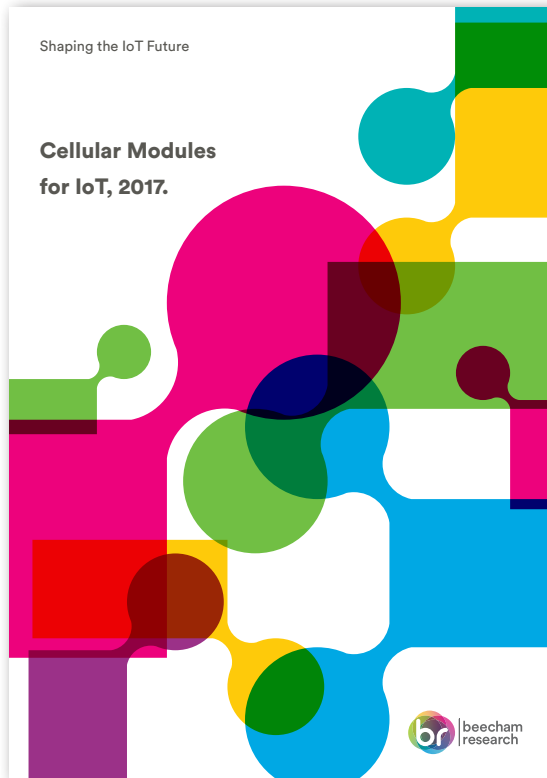
- a. Market assessment including H1 2017 actual shipments and projections to year end.
- b. In light of 2017 actuals, forecast to 2021
- c. Analysis of new entrants and rapid market share gain over the last 2 years.
- d. Rapid market shifts due to technology changes in 2G, 3G, 4G and 5G.
- e. Pricing analysis and expectations over the period.

This report will be particularly useful for:

- Module suppliers.
- Chip suppliers.
- Distributors.
- System integrators and solution providers.
- Product manufacturers/OEMs.
- Application developers.
- Mobile network operators.
- Mobile virtual network operators and airtime resellers.



Download the report here.








Beecham Research

Beecham Research is a leading technology market research, analysis and consulting firm established in 1991. We have specialized in the development of the rapidly-growing Connected Devices market, often referred to as M2M (machine-to-machine) and IoT (Internet of Things), worldwide since 2001. We are internationally recognised as thought leaders in this market and have deep knowledge of the market dynamics at every level in the value chain.

We are experts in M2M/IoT services and platforms and also in IoT solution security, where we have extensive technical knowledge. We are the leading analysts in satellite M2M and our connected devices programme includes modules, stand-alone modems, routers and the emerging category of IoT Gateways which combine wireless, fixed, satellite and wireless MESH technologies. In addition to this, we provide wide-ranging support for business and sales development activities.



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