The World Market for Cellular Modules in M2M Communications - 2012 Edition

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A report which provides a comprehensive analysis on the rapidly evolving market for cellular modules in M2M communications.

Key Questions Answered

- What was the total market size for cellular modules used in M2M communications in 2011? What is the market size expected to be in 2016?
- Which vertical markets will experience the greatest increase in cellular M2M communications? What specific factors will drive or inhibit growth in each of these markets?
- What cellular air interface technologies will be most commonly used in cellular M2M communications?
- What is the forecast for cellular M2M module shipments by region?
- What were the market shares for the world’s leading M2M module vendors in 2010 and 2011?

Why IMS Research?

- Detailed, rigorous research based on speaking to a wide range of market leaders.
- More than 15 years of experience researching and covering the cellular industry.
- Extensive qualitative and quantitative analysis.
- Access to in-house analysts with years of expertise on the various vertical markets covered in the report.
- Unparalleled detail with analysis of numerous market drivers and barriers.
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- Detailed discussion and forecasts on the use of cellular modules in a variety of M2M vertical markets including automotive, security, metering, medical, and digital signage.
- World market as well as separate vertical market forecasts with splits by air interface technology and region.
- Market share estimates for the leading cellular M2M module vendors presented by both units shipped and by revenue.
- Overview of the air interface technologies used in cellular M2M communications and discussion of the advantages and disadvantages of each technology with respect to the M2M environment.
- Extensive statistical analysis, with over 95 combined data tables and figures.
- In-depth data compiled from discussions with module vendors, network operators, and device OEMs among others.

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Report Introduction

This is the second edition of IMS Research’s "The World Market for Cellular Modules in M2M Communications". This report forms part of a two volume series that sizes the market for non-handset cellular communications. The companion report is entitled "The World Market for Cellular-Enabled Consumer Devices - 2011 Edition" and was published in November 2011.

As the market for mobile handsets becomes increasingly saturated, various participants in the cellular industry are looking to cellular M2M communications as a key opportunity to expand their revenues. At the same time, dropping hardware and connectivity costs, regulatory developments, and the near-ubiquitous availability of today's cellular networks have led a variety of vertical markets to look to embedded cellular technology as an ideal way to enhance the appeal of their devices and services. Within this report IMS Research has specifically focused on the nine key vertical markets that it believes will emerge as the principal users of cellular M2M technology. Together these industries, which range from automotive to healthcare to metering, appear poised to propel the cellular module market to substantial growth over the next five years. This report examines each of these diverse markets and presents in depth analysis of the specific factors that IMS Research believes will drive or inhibit the growth of cellular M2M within each.

With over 95 tables and figures, this report provides extensive quantitative data on the cellular M2M module market. Detailed forecasts are offered both on a worldwide level and by vertical market, with market size estimates for 2010 and 2011 and forecasts through 2016. All module shipment forecasts are split by air interface technology and region. Finally, the report includes discussion of the competitive environment, including market shares for the leading module vendors.

Market Breakdown

By Vertical Market
- Asset Tracking and Monitoring
- Automotive
- Commercial Transportation
- Digital Signage
- EFT/POS & Vending
- Fixed Wireless Terminals
- Medical
- Metering and Smart Grid
- Security
- Other

By Air Interface Technology
- GPRS
- EDGE
- CDMA 2000 1x RTT
- CDMA 2000 EV-DO
- WiMAX
- LTE
- HSPA
- WCDMA/HSPA
- TD-SCDMA

By Region
- Americas
- Europe
- Middle East & Africa
- Asia
- North America
- Latin America

Source: IMS Research
"The data requirements of most M2M vertical markets are far different from those of consumer devices. In most instances, modules using 2G air-interface technologies are more than capable of providing sufficient transmission rates for M2M applications. However, network obsolescence is an emerging consideration that must be taken into account and will act as a key driver for the increased use of 3G and 4G modules in M2M communications in the coming years."

Josh Builta, IMS Research

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