Global LWAN - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts (2025 - 2030)

Market Report | 2025-04-28 | 199 pages | Mordor Intelligence

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Report description:

The Global LWAN Market is expected to register a CAGR of 8.35% during the forecast period.

Key Highlights
- Low-Power Wide-Area Networks (LPWANs) are becoming one of the main building blocks for the Industrial IoT (IIoT) ecosystem, with most of the industries adopting Industry 4.0 practices and an alternative to 2G/3G/4G cellular networks where long-range communication at light speed is needed by battery-powered sensors spread around the factory. Among the most promising approaches, SIGFOX is an ultra-narrow band technology that allows similar signal coverage to cellular networks at one-thousandth of its power requirements.
- With the environmental changes, businesses are investing highly in smart city development, which is expected to play an important role in IoT adoption. Global Smart Cities Primer Picks, Bank of America Merrill Lynch (BAML) anticipates smart city technology and management investment to reach more than USD 3.48 trillion by 2026 globally.
- Increasing roll-outs in many parts of the world are driving the growth of the LPWAN industry. For instance, on March 15, 2022, The LoRa Alliance, the global association of companies backing the open LoRaWAN standard for the internet of things (IoT) low-power wide-area networks (LPWANs), announced significant market traction across France and Spain. LoRaWAN is already one of the preferred global choices for LPWAN, with more than 225 million LoRa/LoRaWAN end nodes.
- For the last two years, the COVID-19 pandemic has continued to impact many industries of the world as the infection spreads through person-to-person contact. Transmission and prognosis, once infected, are potentially influenced by many factors. Particulate Matter (PM) is a complex mixture of solid and/or liquid particles suspended in the air that can vary in shape, size, and composition, and recent scientific work correlate this index with a considerable risk of COVID-19 infections.
- The Internet of Things (IoT) and Early Warning Systems (EWS) have given rise to the development of Low Power Wide Area Networks (LPWAN) based on sensors, which monitor In-door Air pollution Quality (IAQ) and measure PM levels in real-time. The

COVID-19 pandemic had led to the implementation of lockdown regulations across several nations resulting in disruptions in export and import activities of Enterprise LPWAN.
- Few of the challenges to this technology that may hamper the overall adoption and market include the cost of changing legacy equipment, future coverage and scalability, technology co-existence, and real-time communication. In addition, the network's security, not as robust as sending data back to endpoints, can also be prone to interference.

LWAN Market Trends

Utilities Segment will Hold the Major Share of the Market

- The introduction of LoRa in 2010 and Sigfox in 2009 was expected as the start of the shift away from FN and PLC. However, the utility industry is risk-averse, and any new technology takes time to gain a foothold in the market. The utilities tended to often stick to the 'tried and tested' solutions, especially in established markets. However, these technologies saw enough interest that they caused a reactive response from the telecommunication industry, thus paving the way for the creation of LTE-M and NB-IoT.
- Communities and cities across the globe are looking to adopt advanced technologies such as the Internet of Things (IoT) and Cyber-Physical Systems (CPS) to improve the quality of life for their residents. Such a system involves cyber-networking devices and other supporting systems working with physical infrastructure. When applied to health care, transportation, utilities, and other sectors, these CPS and IoT could promote economic growth, expand and improve services, and enhance the quality of life.
- For Instance, In France, Birdz, which already operates 400,000 LoRa-connected smart meters in Lyon, announced that it would connect over 3 million smart water meters to the Public LoRaWAN network over the next ten years. NICIGAS installed 850,000 meters of gas with Sigfox connectivity in Japan. In China, NB-IoT tracks nearly 1 million electric bikes in Zhengzhou and monitors 170,000 wired smoke detection and warning systems in rental homes in the Hangzhou Yuhang district.
- Many government agencies are actively initiating new projects to improve the life quality of residents. For instance, NIST and its partners advise and nurture Clusters in their development of groundbreaking Internet of Things (IoT) applications for smart cities and communities. The GCTC so far has recruited over 200 Action Clusters, involving 500 companies and over 200 cities and universities. Forty percent of these Clusters are outside the U.S. These Action Clusters are enabling innovation across the United States, Asia, Africa, and Europe.
- In February 2022, NIST International Collaboration will develop a new framework for smart cities and communities. The framework provides the basis for developing measurement methods and tools that allow for adaptability, integration, and extensibility at three interacting levels of analysis: infrastructure services, technologies, and community benefits.

Asia Pacific market Accounts to Hold Major Growing Market

- The market growth is attributed to the rising demand for IoT applications. Smart city development is expected to support the market demand. Prominent technology enterprises are emphasizing strategic partnerships to deliver diverse smart city solutions like IoT, digital transformation, and the adoption of industry 4.0. For instance, in September 2020, Nokia signed a partnership agreement with Optus, a telecommunications company, to provide IoT software solutions for Australian enterprises.
- The Korea-World Bank Smart City Partnership Program (P166893), more widely known as the Global Smart City Partnership Program (GSCP), was launched through a long-standing partnership between the World Bank and Korea. The Bank and MOLIT agreed to collaborate through a dedicated program on smart cities, for which the latest report was published in December 2021 called GLOBAL SMART CITY PARTNERSHIP PROGRAM PHASE 1 COMPLETION REPORT, according to which the demanding nature of the client is focused on digital transformation (technologies like digital twin and adaptation of industry 4.0), and smart city infrastructure.

- According to the Economist Intelligence Unit (EIU), for companies in Asia, leadership in digital transformation is often the result of consumer pressure. Asia is becoming the place where consumer companies are figuring out how to make their business future-proof, which becomes evident as China is leapfrogging its peers elsewhere when it comes to digital technology. For instance, in China, NB-IoT monitors 170,000 connected smoke detection and alarm devices in rental homes in the Yuhang district of Hangzhou and is used to track close to 1 million electric bikes in Zhengzhou.
- The public and government sector segment held more than 25% of Asia Pacific low power wide area network (LPWAN) market share in 2021 as the region is witnessing rapid industrialization and commercialization. The concept of digitization is gaining traction, and Industry 4.0 projects are driving the market across the region.

LWAN Industry Overview

The LWAN market is moderately fragmented. With the increase in the IoT ecosystem, various technologies are also evolving, such as LPWAN, which drives the players to invest in the market. Moreover, the players are entering the market gradually with technological upgradation. Some of the key players include MachineQ(Comcast), Sigfox SA, AT&T Inc., ActilityS.A., Semtech Corporation, Deutsche Telekom, and Ingenu Inc., among others.

- May 2022 - Semtech collabrated with CITiLIGHT, provider of smart lighting solutions for smart cities, for its Velocity LMS lighting management system. VELOCITi LMS features the LoRaWAN standard and Semtech's LoRa devices to communicate large packets of data over a long range.
- May 2022 - Syniverse, a communications technology provider to enterprises and carriers, and Twilio the customer engagement platform that drives real-time, personalized experiences, announced that the companies have closed on their previously announced strategic partnership. Twilio invested USD 750 million for common equity in Syniverse.

Additional Benefits:

- The market estimate (ME) sheet in Excel format
- 3 months of analyst support

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