Internet of Things (IoT) Software - A Global Market Overview

Market Report | 2025-08-13 | 493 pages | Industry Experts

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Report description:

Global Internet of Things (IoT) Software Market Trends and Outlook

The global Internet of Things (IoT) Software market is entering a high-growth era, driven by the accelerating convergence of connected devices, cloud-native platforms, and real-time data intelligence. Valued at over US$208 billion in 2024, the market is projected to exceed US$466 billion by 2030, expanding at a robust CAGR of 14.3%. As enterprises and governments scale their IoT initiatives beyond device connectivity, the demand is rapidly shifting toward software platforms that enable device lifecycle management, edge-cloud orchestration, AI-driven analytics, and secure, scalable integration across diverse infrastructures.

This surge is being powered by several transformative trends. The move from hardware-led deployments to platform-centric ecosystems is redefining competitive dynamics, with leading vendors offering modular, API-driven solutions that support low-latency processing, predictive insights, and immersive visualization capabilities such as digital twins and AR interfaces. Edge-native architectures are gaining prominence, especially in sectors like manufacturing, healthcare, energy, and transportation, as organizations seek real-time intelligence closer to the source of data. Simultaneously, macroeconomic and regulatory drivers-including national infrastructure digitization programs, ESG compliance, and industry-specific security mandates-are catalyzing long-term investment in scalable, interoperable IoT software solutions. While challenges like vendor fragmentation, integration complexity, and cybersecurity risks persist, the market is undergoing rapid innovation to deliver vertical-specific, cloud-compatible, and AI-integrated software stacks that will define the next decade of connected enterprise ecosystems.

Leading players in the global IoT Software market include AWS, Microsoft, Siemens, IBM, Cisco, PTC, SAP, Schneider Electric, and Oracle, all of which offer end-to-end platforms integrating device management, analytics, edge computing, and AI. Emerging and specialized vendors such as Ayla Networks, Losant, ClearBlade, and Kaa IoT are also gaining traction by providing modular, vertical-focused, and developer-friendly solutions.

Internet of Things (IoT) Software Regional Market Analysis

In 2024, North America led the global IoT Software market with an estimated share of approximately 34% of global revenue. This

dominance is underpinned by strong enterprise digital transformation, early cloud-native IoT adoption, and widespread deployment in industries such as healthcare, energy, and smart infrastructure. The region is home to key platform providers like AWS, Microsoft, and Cisco, which have driven rapid ecosystem maturity through integrated cloud, AI, and edge capabilities. Asia-Pacific, however, is poised to be the fastest-growing regional market, registering a robust CAGR of 17.9% between 2024 and 2030. This acceleration is driven by large-scale IoT deployments in China, India, and Southeast Asia across public utilities, connected transportation, and smart agriculture. National digital infrastructure investments and strong government support are also acting as major tailwinds, positioning the region as a critical growth engine for the global IoT software ecosystem.

Internet of Things (IoT) Software Market Analysis by Software Type

IoT Platforms constituted the largest software category, generating approximately 33.2% of the global IoT software market revenue in 2024. These platforms serve as the backbone for managing device connectivity, lifecycle operations, data orchestration, and integration with IT/OT systems. Their dominance reflects the growing demand for scalable, modular platforms that enable real-time data collection, multi-device management, and cross-cloud compatibility. Security Software, while comparatively smaller in size, is projected to be the fastest-growing segment with a CAGR of 16.4% during 2024-2030. By 2030, it is expected to reach US$82 billion, underscoring rising enterprise concerns around IoT-specific vulnerabilities, including firmware-level threats, device spoofing, and data privacy compliance. This surge is being driven by critical infrastructure protection mandates, increasing IoT cyberattacks, and embedded security features becoming a procurement requirement across healthcare, energy, and industrial sectors.

Internet of Things (IoT) Software Market Analysis by Application

As of 2024, Predictive Maintenance emerged as the largest application segment, which equates to roughly 22.2% of total market value. Its dominance reflects the widespread enterprise need to optimize equipment uptime, reduce unplanned outages, and lower maintenance costs through real-time analytics and machine learning. Predictive maintenance software has become integral to industrial IoT deployments in sectors such as manufacturing, energy, and transportation, where asset-intensive operations demand continuous performance monitoring. Looking ahead, Smart Cities represent the fastest-growing application segment, expected to expand at a CAGR of 17.2% between 2024 and 2030. The sharp rise is fueled by global urbanization, sustainability mandates, and investments in connected infrastructure like adaptive traffic systems, smart lighting, waste management, and mobility platforms. Multi-stakeholder initiatives across North America, Europe, and Asia-Pacific are accelerating platform adoption for city-wide data orchestration and real-time services.

Internet of Things (IoT) Software Market Analysis by Company Type
In 2024, Large Enterprises dominated IoT software spending with a market value of US$151.8 billion, accounting for approximately 68.6% of global revenue. These organizations typically operate complex infrastructures across multiple geographies, requiring robust, scalable platforms with deep integration capabilities across IT and OT systems. Their demand is largely driven by smart manufacturing, utilities, logistics, and industrial automation initiatives where real-time data insights and operational reliability are critical. Meanwhile, SMEs are emerging as the fastest-growing customer segment, with a projected CAGR of 15.1% between 2024 and 2030. Growth is being fueled by the rise of low-code IoT tools, flexible cloud-based pricing, and pre-integrated, outcome-focused software stacks that eliminate traditional entry barriers. Mid-market manufacturers, retailers, and service providers are particularly driving adoption, seeking to optimize operations, enhance customer experience, and enable new business models through plug-and-play IoT solutions.

Internet of Things (IoT) Software Market Analysis by Industry Sector

Manufacturing remained the largest industry vertical for IoT software in 2024, contributing approximately 23.8% of the global market. The sector's continued leadership is driven by aggressive adoption of industrial IoT (IIoT) platforms for predictive

maintenance, asset performance optimization, and process automation. Manufacturers are leveraging cloud-native, edge-integrated IoT software to modernize production lines, reduce downtime, and improve supply chain visibility, especially in automotive, electronics, and heavy machinery segments. On the other hand, Healthcare is set to be the fastest-growing vertical, projected to expand at a CAGR of 17.2% from 2024 to 2030. This growth reflects the widespread adoption of IoT software in remote patient monitoring, hospital asset tracking, and vaccine cold chain management. Data privacy regulations such as HIPAA and GDPR are further accelerating demand for secure, compliant platforms tailored for clinical environments and healthcare IoT devices. Closely following healthcare in growth is the Government sector, supported by national investments in smart cities, connected infrastructure, and public safety systems.

Internet of Things (IoT) Software Market Report Scope

This global report on Internet of Things (IoT) Software market analyzes the global and regional market based on Software Type, Application, Company Type and Industry Sector for the period 2021-2030 with forecasts from 2024 to 2030 in terms of value in US$. In addition to providing profiles of major companies operating in this space, the latest corporate and industrial developments have been covered to offer a clear panorama of how and where the market is progressing.

Key Metrics
Historical Period: 2021-2024
Base Year: 2024
Forecast Period: 2024-2030
Units: Value market in US$
Companies Mentioned: 30+

Internet of Things (IoT) Software Market by Geographic Region
□□North America (The United States, Canada and Mexico)
□□Europe (Germany, the United Kingdom, France, Italy, the Netherlands, Spain, Russia, Switzerland and Rest of Europe)
□□Asia-Pacific (China, Japan, India, Australia, Singapore, South Korea and Rest of Asia-Pacific)
□□South America (Brazil, Argentina, Colombia, Chile, Peru and Rest of South America)
□□Middle East & Africa (the United Arab Emirates, South Africa, Egypt, Saudi Arabia, Morocco, Kuwait, Qatar and Rest of Middle East & Africa)

Internet of Things (IoT) Software Market by Software Type
□□IoT Platforms
□□Analytics Software
□□Application Software
□□Security Software
□□Other Software Types

Internet of Things (IoT) Software Market by Company Type
□□Large Enterprises
□□SMEs

Internet of Things (IoT) Software Market by Application
□□Predictive Maintenance
□□Smart Metering
□□Asset Tracking
□□Remote Monitoring

□□Smart Buildings
□□Smart Cities
□□Other Applications

Internet of Things (IoT) Software Market by Industry Sector
□□Banking, Financial Services, and Insurance (BFSI)
□□IT & Telecom
□□Retail
□□Healthcare
□□Manufacturing
□□Public Sector
□□Energy & Utilities
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o Bosch.IO
o Cisco
o ClearBlade
o Emerson
o Eurotech
o Fiware Foundation
o GE Digital
o Google
o Hitachi Vantara
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