

Industrial Networking Solutions - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts (2026 - 2031)

Market Report | 2026-01-16 | 120 pages | Mordor Intelligence

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Report description:

Industrial Networking Solutions Market Analysis

Industrial networking solutions market size in 2026 is estimated at USD 36.47 billion, growing from 2025 value of USD 30.61 billion with 2031 projections showing USD 87.47 billion, growing at 19.12% CAGR over 2026-2031. The surge reflects rapid convergence of operational-technology assets with enterprise IT networks, creating real-time visibility across increasingly automated production environments. Demand is amplified by a shift from legacy fieldbus to Ethernet-based factory floors that meets sub-millisecond latency targets for autonomous equipment. Private 5G in combination with edge AI is lowering total cost of ownership by up to 30% for heavy industries through predictive maintenance. Government smart-manufacturing stimulus is another catalyst: China alone routed USD 2.8 billion of 2024 funds into industrial networking upgrades. Together, these forces underpin a structurally high-growth trajectory for the Industrial networking solutions market.

Global Industrial Networking Solutions Market Trends and Insights

Rapid Shift to IIoT-Ready Ethernet-Based Factory Floors

Ethernet now powers 73% of new manufacturing network installs, up from 45% in 2020, as factories modernize for machine-vision workloads exceeding 1 Gbps. BMW's Spartanburg plant runs a private 5G grid that secures 99.9% uptime for vision-driven quality checks. Yet mid-size firms still face USD 2.5 million line-level retrofit costs that slow broad adoption.

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Convergence of OT/IT Driving SD-WAN Adoption in Plants

SD-WAN deployments in manufacturing jumped 340% in 2024 as enterprises exported enterprise-security policies to deterministic shop-floor traffic. Hyundai AutoEver cut 60% in network management expense across 47 sites while boosting application performance 35%. Traditional VLAN segmentation lacks the agility required for autonomous mobile robots, so OT-aware SD-WAN is becoming standard.

Cyber-Physical Security Skill-Gap in Brown-Field Sites

Some 78% of manufacturers cannot find OT-cyber talent, slowing convergence plans. OT-oriented cyber incidents rose 87% in 2024, exposing legacy weaknesses. Cisco and Rockwell's Digital Skills for Industry initiative aims to train 100,000 APAC professionals to ease the bottleneck.

Other drivers and restraints analyzed in the detailed report include:

5G Private Networks Enabling Ultra-Low-Latency ControlEdge-AI-Powered Predictive Maintenance Lowering TCOProprietary Protocol Lock-In Inflating Migration Cost

For complete list of drivers and restraints, kindly check the Table Of Contents.

Segment Analysis

Hardware commanded 60.35% revenue in 2025, reinforcing the Industrial networking solutions market's dependence on rugged switches, routers, and access points for harsh sites. Premium fanless switches often list at triple enterprise prices, supporting sustained temperatures and vibration. However, software and services are scaling at 21.95% CAGR, signaling a decisive pivot toward AI-driven network monitoring and subscription models. Siemens' SIRIUS 3RC7 module embeds software-defined networking at the control layer, evidencing hardware-software convergence. Managed-service providers booked 45% annual growth in 2024 as firms outsourced cyber-hardening and 24/7 monitoring.

Wired Ethernet secured 67.55% share in 2025 owing to deterministic control requirements and Ethernet-APL's 1,000-m intrinsic-safety reach. Wireless is rising at a 25.1% CAGR as private 5G untethers autonomous robots and accelerates plant re-configuration. Toyota's material-handling 5G rollout clocked 99.5% reliability while slicing install budgets 60% versus copper. Ultra-low-power modules from Texas Instruments now consume 90% less energy, strengthening battery-powered sensor economics.

The Industrial Networking Solutions Market Report is Segmented by Component (Hardware, Software and Services), Type of Connectivity (Wired, Wireless), Deployment Type (On-Premises, Cloud), End-User Industry (Automotive, Financial Services, Manufacturing, Telecommunications, Logistics and Transportation, Mining, Oil and Gas, Energy and Utilities), and Geography. The Market Forecasts are Provided in Terms of Value (USD).

Geography Analysis

Asia-Pacific continues to anchor the Industrial networking solutions market with 34.55% 2025 share, propelled by China's policy-backed digitalization and Japan's high-throughput electronics manufacturing ecosystems. The region's growth outlook remains compelling as India and ASEAN economies scale smart-factory rollouts under Make-in-India and Industry4WRD programs. North America follows as a mature adopter, sustained by USD 800 million of US federal grants that subsidize secure OT-IT upgrades. Europe benefits from stringent cyber-resilience directives and Germany's EUR 1.2 billion SME fund, fostering

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broad-based network modernization. The Middle East & Africa region, though smaller, showcases the highest 22.95% CAGR, with Gulf oil majors installing private 5G to operate drilling assets in corrosive deserts and offshore platforms. Latin America's opportunity hinges on mining and renewable-energy build-outs that demand resilient Ethernet-over-fiber topologies.

List of Companies Covered in this Report:

ABB Ltd Advantech Co., Ltd. Antaira Technologies LLC Aruba Networks (Hewlett Packard Enterprise Co.) Belden Inc. Cisco Systems, Inc. Dell Technologies Inc. Eaton Corporation plc Hirschmann Automation (Belden) Honeywell International Inc. Huawei Technologies Co., Ltd. Juniper Networks, Inc. Moxa Inc. Nokia Corporation Phoenix Contact GmbH and Co. KG Red Lion Controls Inc. (Spectris plc) Rockwell Automation, Inc. Schneider Electric SE Sierra Wireless Inc. Siemens AG

Additional Benefits:

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

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