Executive summary

- The world market in 2020 is estimated to have been $2.92 billion.
- In 2021, revenues are forecast to grow by 5.7%; overall, from 2020 to 2025, revenues are forecast to grow at a 10.3% compound annual growth rate (CAGR).
- Unit shipments are forecast to grow at a 9.8% CAGR from 2020 to 2025, while the ASP is forecast to increase at a 0.6% CAGR.

Note: This document is an excerpt; please contact Omdia for the full report.

Industrial edge networking components by product type
Revenue US$ millions

- Connectors
- Gateways and protocol converters (IPC base gateway + IIoT gateway + protocol converters)
- Router and WAP
- All types of switches (Unmanaged + managed layer 2 + layer 3)

Industrial edge networking components by region
Revenue (percent)

- EMEA
- Americas
- Asia Pacific

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Cisco leads the market for industrial edge networking components

- **Wireless access point market share**: 50.5%
- **Managed Layer 2 switches market share**: 24.5%
- **Industrial routers market share**: 38.5%
- **Managed Layer 3 switches market share**: 32%

Cisco leads every segment of the industrial networking market.
In 2017, Cisco became the leader in industrial edge networking components market and maintained its number one position going into 2020.

Cisco has not only maintained its market position but has also managed to increase its market share to 19.5%.

It is worth mentioning that Cisco is enjoying the highest growth among the leading companies and is particularly strong in the Americas.
World: Market share estimates comparison for layer 2 managed switches between 2019–2020

*Cisco – increasing its market share*

- Cisco is maintaining its market dominance in managed switches – layer 2 market since 2016.
- Cisco successfully captured additional market share from its competitors in 2020.
Cisco leads in layer 3 switch market

- Cisco has dominated layer-3 managed switches market for many years now and it continues to lead this market.
- To put things in perspective the market share of Cisco for layer-3 managed switches is approximately twice to that of the number 2 player.

### Layer 3 managed switches market share

<table>
<thead>
<tr>
<th>Year</th>
<th>Cisco</th>
<th>Belden</th>
<th>Westermo</th>
</tr>
</thead>
<tbody>
<tr>
<td>2019</td>
<td>28.5%</td>
<td></td>
<td></td>
</tr>
<tr>
<td>2020</td>
<td>32%</td>
<td></td>
<td>+3.5%</td>
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</tbody>
</table>

2019 market size: $227 million

2020 market size: $222 million
World: Market share estimates comparison for routers between 2019–2020

Cisco – the single most dominant player in Router market

- Cisco has a clear dominance in this market and has 38.5% of the market share
- The closest competitor has nearly 31% less market share than Cisco
Cisco – owns half of this market

- Cisco has a clear dominance in this market and has half of the market share
- The closest competitor has nearly 36.5% less market share than Cisco

<table>
<thead>
<tr>
<th>Company</th>
<th>2019 Market Share</th>
<th>2020 Market Share</th>
</tr>
</thead>
<tbody>
<tr>
<td>Cisco</td>
<td>48.5%</td>
<td>50.5%</td>
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<tr>
<td>Moxa</td>
<td>10%</td>
<td>10%</td>
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<tr>
<td>Siemens</td>
<td>9.5%</td>
<td>9.5%</td>
</tr>
</tbody>
</table>

2019 market size: $273 million
2020 market size: $261 million

+2%