Industrial Edge Networking Components – 2020

Report Excerpts
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.
Cisco leads every segment of the industrial networking market.
Market landscape for industrial edge networking components

Cisco – strengthens its market position

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.

Industrial Ethernet network components market share

<table>
<thead>
<tr>
<th>Company</th>
<th>2019 Market Share</th>
<th>2020 Market Share</th>
</tr>
</thead>
<tbody>
<tr>
<td>Cisco</td>
<td>18%</td>
<td>19.5%</td>
</tr>
<tr>
<td>Siemens</td>
<td>11%</td>
<td>13%</td>
</tr>
<tr>
<td>Belden</td>
<td>12%</td>
<td>15%</td>
</tr>
</tbody>
</table>

Total market size:
- 2019: $3.0 billion
- 2020: $2.9 billion
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.

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<table>
<thead>
<tr>
<th>Market Share (%)</th>
<th>Revenue (in millions)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Cisco</td>
<td>28.5%</td>
</tr>
<tr>
<td>Belden</td>
<td>32%</td>
</tr>
<tr>
<td>Westermo</td>
<td>3%</td>
</tr>
</tbody>
</table>
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2019 market size: $227 million

2020 market size: $222 million

+3.5% increase
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.