

Voice Over LTE (VoLTE) Market Report by Technology (Voice Over IP Multimedia Subsystem (VoIMS), Circuit Switched Fall Back (CSFB), Dual Radio/Simultaneous Voice and LTE (SVLTE), Voice Over LTE Via Generic Access Network (VOLGA), Single Radio Voice Call Continuity (SRVCC)), Device Type (Smartphones, Routers, Wireless Modems, and Others), End Use Industry (Corporate, Commercial, Government), and Region 2024-2032

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Abstracts

The global voice over LTE (VoLTE) market size reached US\$ 15.2 Billion in 2023. Looking forward, IMARC Group expects the market to reach US\$ 729.3 Billion by 2032, exhibiting a growth rate (CAGR) of 52.6% during 2024-2032. The growing penetration of Internet of Things (IoT) devices and applications requiring low-power, and low-latency communication capabilities, the escalating consumer expectations for high-quality voice services, and continual technological advancements are some of the major factors propelling the market.

Voice over LTE (VoLTE) is a communication standard that allows for the transmission of voice and multimedia content over 4G Long-Term Evolution (LTE) networks, an improvement over the traditional 2G or 3G networks. Unlike previous generation networks, VoLTE delivers high-quality, crisp voice calls and enables simultaneous use of voice and data. It works by converting the voice into a digital signal, which is transmitted over the LTE network, facilitating rapid data transfer and high-definition voice calls. This digital transformation also paves the way for additional services such as video calling, file sharing, or live streaming. Furthermore, it supports a greater call

capacity than its predecessors, contributing to its efficiency.

The proliferation of Internet of Things (IoT) devices and applications majorly drives the global market. IoT devices often require low-power, low-latency communication capabilities, making VoLTE a suitable choice for supporting these applications. Along with this, VoLTE offers distinct advantages for roaming and international calls, making it an attractive choice for travelers and international businesses. With traditional roaming, calls are usually routed through legacy networks, leading to reduced call quality and higher costs. In addition, consumer expectations for high-quality voice services have grown significantly over the years. Traditional circuit-switched voice calls, while reliable, often lack the clarity and richness that users now expect from their communication experiences. VoLTE, with its HD voice quality and reduced background noise, addresses this demand for superior voice communication. Moreover, Rich Communication Services (RCS) represent the next evolution of messaging and aim to provide a more interactive and feature-rich messaging experience compared to traditional SMS. RCS includes features, such as read receipts, file sharing, group chats, and video calling, creating a positive market outlook.

VoLTE Market Trends/Drivers:

Rising Smartphone Penetration

The increasing penetration of smartphones globally is another vital market driver for VoLTE. Smartphones have become an indispensable part of modern life, and their affordability and widespread availability have led to a rise in adoption across different demographic segments. As a result, a larger portion of the population now possesses VoLTE-capable devices. VoLTE requires compatible devices that support Voice over LTE technology, which can utilize the IP-based network for voice calls. As smartphone ownership rises, the potential customer base for VoLTE services expands significantly. Mobile network operators and service providers recognize this trend and are increasingly investing in VoLTE infrastructure to leverage the growing smartphone user base.

Growing Demand for Enhanced Communication Services

With the increasing reliance on digital communication and the need for efficient and reliable voice services, there is a growing demand for enhanced communication solutions. VoLTE offers several features and benefits that cater to this demand, such as HD voice quality, faster call setup, and seamless handovers between 4G and 5G networks. Moreover, VoLTE enables the integration of voice and data services, enabling

users to access the internet, use applications, and make voice calls simultaneously without any compromise in quality. This enhanced user experience is driving the demand for VoLTE, especially in industries that heavily rely on real-time communication, such as healthcare, emergency services, and business communications.

Expanding 4G and 5G Networks

One of the key market drivers for the Voice over LTE (VoLTE) industry is the continuous expansion of 4G and 5G networks worldwide. As more countries upgrade their infrastructure to support higher data speeds and improved network efficiency, the demand for VoLTE services rises. 4G networks have already become widespread, and 5G networks are rapidly rolling out, promising even faster data speeds, lower latency, and higher capacity. In addition, the proliferation of these advanced networks creates a conducive environment for VoLTE adoption. VoLTE offers significant advantages over traditional circuit-switched voice calls, such as higher call quality, faster call setup times, and concurrent voice and data usage. As consumers experience the benefits of VoLTE on these modern networks, the demand for compatible devices and services grows, driving the VoLTE market forward.

VoLTE Industry Segmentation:

IMARC Group provides an analysis of the key trends in each segment of the global voice over LTE (VoLTE) market report, along with forecasts at the global, regional and country levels from 2024-2032. Our report has categorized the market based on technology, device type and end use industry.

Breakup by Technology:

Voice Over IP Multimedia Subsystem (VoIMS)

Circuit Switched Fall Back (CSFB)

Dual Radio/Simultaneous Voice and LTE (SVLTE)

Voice Over LTE Via Generic Access Network (VOLGA)

Single Radio Voice Call Continuity (SRVCC)

The report has provided a detailed breakup and analysis of the market based on the technology. This includes voice over IP multimedia subsystem (VoIMS), circuit switched fall back (CSFB), dual radio/simultaneous voice and LTE (SVLTE), voice over lte via generic access network (VOLGA), and single radio voice call continuity (SRVCC).

The adoption of circuit switched fall back (CSFB) in the voice over LTE (VoLTE) industry is primarily driven by the need to maintain voice services for devices that do not yet support VoLTE. As VoLTE technology becomes prevalent, not all devices in the market are equipped to handle VoLTE calls. CSFB acts as a bridge between these legacy devices and the LTE network by facilitating a smooth transition to circuit-switched networks (2G/3G) when initiating or receiving voice calls. This seamless handover ensures that users with non-VoLTE compatible devices can still access reliable voice services without any disruptions.

On the contrary, single radio voice call continuity (SRVCC) in the voice over LTE (VoLTE) industry stem from the increasing demand for seamless voice services during the transition from LTE to legacy 2G/3G networks. SRVCC addresses this need by ensuring uninterrupted voice calls when a user moves out of the LTE coverage area, guaranteeing a smooth handover to 2G/3G networks without call drops or disruptions. This technology becomes particularly crucial as more network operators adopt VoLTE, aiming to enhance voice call quality and free up spectrum for data services.

Breakup by Device Type:

Smartphones

Routers

Wireless Modems

Others

A detailed breakup and analysis of the market based on the device type has also been provided in the report. This includes smartphones, routers, wireless modems, and others.

The market drivers for smartphone device type in the voice over LTE (VoLTE) industry are manifold and impactful. Along with this, the increasing consumer preference for smartphones with advanced features and functionalities fuels the demand for VoLTE-compatible devices. As VoLTE offers superior voice call quality and faster call setup times, consumers seek smartphones that can leverage this technology for enhanced communication experiences. In addition, the relentless competition among smartphone manufacturers drives them to incorporate VoLTE support as a differentiating factor, attracting tech-savvy consumers.

On the other hand, routers play a crucial role in VoLTE implementations for homes, businesses, and other environments where multiple devices rely on a stable internet

connection for voice services. As VoLTE becomes increasingly popular, the demand for routers with VoLTE support rises, enabling users to enjoy seamless voice calls over LTE networks. Moreover, businesses and service providers seek VoLTE-capable routers to ensure efficient voice communication for their customers and employees, reducing call drop rates and enhancing call quality. The versatility of VoLTE-enabled routers in managing voice traffic alongside data transmission also contributes to their market growth.

Breakup by End Use Industry:

Corporate
Commercial
Government

The report has provided a detailed breakup and analysis of the market based on the end use industry. This includes corporate, commercial, and government.

The corporate end-use industry serves as a significant market driver in the voice over LTE (VoLTE) industry, primarily due to its essential communication needs. As businesses continue to embrace digital transformation and remote work models, the demand for VoLTE services rises. VoLTE offers superior voice call quality, reduced latency, and faster call setup times, making it an attractive choice for corporate users who rely heavily on voice communication for collaboration and decision-making. Additionally, VoLTE's ability to seamlessly integrate with other communication technologies, such as unified communications (UC) platforms, enhances productivity and efficiency within corporate environments.

On the contrary, the commercial end-use industry serves as a crucial market driver in the voice over LTE (VoLTE) industry due to its diverse communication requirements. As businesses across various sectors, such as retail, hospitality, and transportation, aim to deliver excellent customer service and seamless operations, in industries where reliable and uninterrupted voice communication is critical, such as emergency services and logistics, VoLTE offers significant advantages, ensuring smooth coordination and real-time updates. Furthermore, as commercial entities continually seek to optimize their communication infrastructure, VoLTE presents an attractive option for converging voice and data services, streamlining operations and reducing costs.

Breakup by Region:

North America
United States
Canada
Asia-Pacific
China
Japan
India
South Korea
Australia
Indonesia
Others
Europe
Germany
France
United Kingdom
Italy
Spain
Russia
Others
Latin America
Brazil
Mexico
Others
Middle East and Africa

Asia Pacific exhibits a clear dominance, accounting for the largest voice over LTE (VoLTE) market share

The report has also provided a comprehensive analysis of all the major regional markets, which include North America (the United States and Canada); Asia Pacific (China, Japan, India, South Korea, Australia, Indonesia, and others); Europe (Germany, France, the United Kingdom, Italy, Spain, Russia, and others); Latin America (Brazil, Mexico, and others); and the Middle East and Africa. According to the report, Asia Pacific represented the largest market.

The voice over LTE (VoLTE) industry in the Asia Pacific region is driven by the region's substantial and ever-expanding mobile subscriber base creating a vast market for VoLTE adoption. As more users seek higher-quality voice services, VoLTE's superior call quality and faster call setup times become increasingly appealing. Additionally, the

rapid deployment and expansion of 4G and 5G networks across the Asia Pacific facilitate the implementation of VoLTE technology. In addition, the region's increasing smartphone penetration and consumers' preference for feature-rich devices further fuel the demand for VoLTE-capable smartphones. Moreover, VoLTE's cost-effectiveness and efficient spectrum utilization align with the region's dynamic telecommunications landscape, encouraging operators to adopt the technology. The Asia Pacific region comprises multiple countries with a high volume of international travelers. VoLTE technology enables seamless voice calls over LTE networks, even when roaming internationally. This aspect is further providing a boost to the appeal of VoLTE for both consumers and operators.

Competitive Landscape:

The global voice over LTE (VoLTE) market is experiencing significant growth due to the growing focus on enhancing the quality of their VoLTE services, aiming for clearer voice quality, faster call setup times, and better reliability. This could involve improving the underlying network infrastructure or the software algorithms used for voice compression and transmission. Along with this, the integration of RCS features, which go beyond voice calls to include text messaging, image, and video sharing, and group chats, significantly supporting the market. In addition, IoT is a significant potential application area for VoLTE, especially for devices that need to make voice calls. Companies are creating specific IoT-focused VoLTE solutions, positively influencing the market. Moreover, the widespread adoption of VoLTE services across different networks and devices for adhering to international standards is contributing to the market.

The report has provided a comprehensive analysis of the competitive landscape in the global voice over LTE (VoLTE) market. Detailed profiles of all major companies have also been provided. Some of the key players in the market include:

Bell Canada (BCE Inc.)
Bharati Airtel Limited
D2 Technologies
Huawei Technologies Co. Ltd.
Mitel Networks Corporation
Nokia Corporation
Telefonaktiebolaget LM Ericsson
T-Mobile USA Inc. (Deutsche Telekom AG)
TPG Telecom Limited
Verizon Communications Inc.

Recent Developments:

In July 2023, Nokia Corporation and Ooredoo Qatar announced the activation of Voice over New Radio (VoNR)-capable 5G devices, the successful demonstration of the first data call in 5G Standalone (SA) mode as part of 5G Standalone Services testing.

In July 2023, Huawei Technologies Co. Ltd. and China Telecom built a 5G one number integrated private network, and the Sandaogou coal mine in Yulin is where it has been put into operation commercially.

In September 2021, Verizon Communications Inc. released the One Talk T67LTE, a brand-new Android-based LTE mobile phone for desk use. With Verizon's One Talk service, it is accessible.

Key Questions Answered in This Report

1. What was the size of the global Voice Over LTE (VoLTE) market in 2023?
2. What is the expected growth rate of the global Voice Over LTE (VoLTE) market during 2024-2032?
3. What are the key factors driving the global Voice Over LTE (VoLTE) market?
4. What has been the impact of COVID-19 on the global Voice Over LTE (VoLTE) market?
5. What are the key regions in the global Voice Over LTE (VoLTE) market?
6. Who are the key players/companies in the global Voice Over LTE (VoLTE) market?

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