

# Canada 5G Device Market - Strategic Insights and Forecasts (2026-2031)

<https://marketpublishers.com/r/C5F2CE6D9123EN.html>

Date: March 2026

Pages: 82

Price: US\$ 2,850.00 (Single User License)

ID: C5F2CE6D9123EN

## Abstracts

The Canada 5G Device Market is forecasted to expand from USD 10.0 billion in 2026 to USD 15.2 billion in 2031, at an 8.7% CAGR.

The Canadian 5G device market is transitioning from an initial phase of foundational network build-out to a mature phase characterized by feature-rich device demand and specialized enterprise application. The market's trajectory is fundamentally tethered to the aggressive deployment of mid-band spectrum, the key enabler of fifth-generation technology's full capability. This network densification, facilitated by federal spectrum auctions through Innovation, Science and Economic Development Canada (ISED), serves as the primary impetus for device turnover across consumer and enterprise segments. Regulatory measures focused on competitive parity and consumer affordability are ensuring that the 5G device market remains dynamic and inclusive. The forthcoming deployment of 5G Standalone core networks will introduce network slicing capabilities that will structurally alter demand for specialized devices across industries, marking the next phase of market evolution through 2031.

## Market Drivers

The ongoing deployment of enhanced 5G spectrum, specifically the 3.5 GHz and newly auctioned 3.8 GHz bands, is the primary demand driver. Carriers' ability to deliver significantly faster data rates and lower latency directly increases consumer demand for smartphones capable of utilizing these higher bandwidths, driving a technology-led replacement cycle. The CRTC's mandate for wholesale mobile wireless access, including 5G roaming, and the establishment of the Mobile Virtual Network Operator framework intensifies market competition, reducing the total cost of device ownership for consumers and stimulating upgrade cycles across all device categories.

Federal commitment to bridging the digital divide is a parallel structural driver for FWA and CPE demand. The Universal Broadband Fund and associated programs stimulate network build-out in underserved rural and remote regions, creating direct and urgent demand for customer premise equipment designed to receive 5G signals as a competitive alternative to fiber and cable infrastructure. Canada's vast geography makes FWA a particularly strategic component of the national connectivity agenda, ensuring sustained, policy-backed procurement volumes for this device category. The June 2025 deployment of Ericsson's 5G Advanced RedCap software by Rogers Communications on its national network further opens new device demand vectors for low-power IoT sensors, consumer wearables, and industrial monitoring equipment.

### Market Restraints

Slower-than-expected mid-band spectrum deployment in urban areas, with some band transition deadlines extending into 2025, limits the palpable performance uplift over 4G in key population centers. This lag suppresses the urgency for widespread premium consumer upgrades, constraining near-term demand for high-tier smartphones where the performance differential remains imperceptible to many users. The absence of a major domestic or North American end-to-end device manufacturing ecosystem creates an enduring supply chain dependency on Asian production hubs for chipsets from Taiwan and South Korea and final assembly from China and Vietnam. This structure introduces exposure to trade tariffs, port congestion, and geopolitical disruptions that all participants in the Canadian market must manage through strategic inventory planning and supplier diversification.

### Technology and Segment Insights

By device type, the market spans smartphones, laptops and tablets with 5G, FWA and CPE devices, routers and hotspots, IoT devices and wearables, and AR/VR/XR and automotive connectivity platforms. The FWA and CPE segment is a structurally important growth category, driven by the government's universal connectivity mandate and the practical constraints of deploying fiber across Canada's geographic expanse. Mid-band spectrum utilization makes 5G FWA commercially viable for rural and remote households, creating a sustained and predictable demand cycle for specialized radio equipment at the consumer and enterprise edge. The July 2025 launch of Rogers Satellite, a satellite-to-mobile text messaging service leveraging low-earth orbit technology and Rogers' national wireless spectrum, further extends the addressable market for smartphones and IoT devices across more than 5.4 million square kilometers

beyond traditional wireless network reach.

By technology tier, the market segments into Basic, Advanced, and Specialized or Premium 5G devices. The Advanced and Specialized tiers are expanding as 5G-A RedCap capabilities come online, enabling a new class of efficient, low-power IoT devices for industrial and consumer applications. The Enterprise and Industrial end-user segment is shifting toward ruggedized, tailored 5G hardware supporting dedicated network slices and integration with proprietary industrial systems, creating a distinct high-value vertical market beyond the consumer upgrade cycle.

### Competitive and Strategic Outlook

The Canadian 5G device market competition is bifurcated between concentrated global OEM competition in the smartphone segment and more diversified, carrier-anchored competition in specialized device categories. The three national carriers, Rogers, TELUS, and Bell, act as effective market gatekeepers through carrier subsidies, device certification, and network compatibility requirements. Samsung Electronics maintains a dominant strategic position across both consumer and infrastructure dimensions. Its February 2024 expanded partnership with TELUS to build Canada's first commercial virtualized and Open RAN 5G network, supplying vRAN 3.0 solutions, positions Samsung as an embedded long-term infrastructure partner whose consumer and enterprise devices are optimized within the TELUS ecosystem.

Rogers Communications acts as a major demand enabler through network innovation, with its 5G-A RedCap software deployment creating direct demand pull for next-generation IoT devices and wearables across both consumer and industrial segments. Apple leads the premium consumer tier through its annual iPhone refresh cycle and deep carrier integration, while Google, Motorola Mobility, and Microsoft compete across mid-range smartphones and enterprise computing verticals. CRTC's Telecom Decision 2025-96 confirming streamlined small cell installation rules on utility poles supports the infrastructure densification necessary for high-band 5G deployment, broadening the long-term addressable market for high-performance FWA and CPE devices in urban and semi-urban environments.

### Key Takeaways

The Canadian 5G device market is positioned for robust growth through 2031, underpinned by spectrum deployment momentum, federal digital inclusion commitments, CRTC-driven competitive dynamics, and the emergence of 5G-Advanced

capabilities that open new IoT and enterprise device categories. Supply chain dependencies and spectrum transition timelines present manageable near-term constraints, but the structural convergence of government policy, carrier innovation, and enterprise IoT adoption creates a durable and diversified demand foundation across consumer, industrial, and rural connectivity segments.

### Key Benefits of this Report

**Insightful Analysis:** Gain detailed market insights across regions, customer segments, policies, socio-economic factors, consumer preferences, and industry verticals.

**Competitive Landscape:** Understand strategic moves by key players to identify optimal market entry approaches.

**Market Drivers and Future Trends:** Assess major growth forces and emerging developments shaping the market.

**Actionable Recommendations:** Support strategic decisions to unlock new revenue streams.

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Historical data from 2021 to 2025 and forecast data from 2026 to 2031

Growth opportunities, challenges, supply chain outlook, regulatory framework, and trend analysis

Competitive positioning, strategies, and market share evaluation

Revenue growth and forecast assessment across segments and regions

Company profiling including strategies, products, financials, and key developments

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