

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

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## Abstracts

The South Korea 5G Device Market will grow at a CAGR of 5.3% to be valued at USD 11.9 billion in 2031 from USD 9.2 billion in 2026.

The South Korean 5G device market represents a mature yet highly dynamic environment, shaped by aggressive national policy and deep consumer appetite for high-speed mobile connectivity. As the country that launched the world's first smartphone-based commercial 5G services in 2019, South Korea has successfully transitioned a substantial share of its population to the standard, surpassing 30 million 5G subscriptions. The market narrative has progressed well beyond initial coverage deployment to a refined focus on sophisticated applications and device proliferation across non-traditional categories, including industrial automation, advanced healthcare, and specialized automotive connectivity. The current phase is defined by a shift from high-volume basic device adoption toward advanced use cases requiring premium and purpose-built 5G hardware, establishing South Korea as a global reference point for 5G ecosystem development.

### Market Drivers

The ubiquitous nationwide 5G network build-out is the foundational demand driver. The three major mobile network operators, SK Telecom, KT, and LG Uplus, have deployed extensive 3.5 GHz-band infrastructure across the country, eliminating the primary barrier to device adoption and sustaining a high volume of consumer smartphone sales and upgrade cycles. The continuous availability of reliable nationwide coverage makes 5G the default connectivity standard for new device procurement across all segments.

The government's 5G+ Strategy is a parallel structural catalyst, directly targeting 10

strategic industries and 5 core services with mandated 5G integration for digital transformation projects. Tax credits for MNO infrastructure investment and corporate 5G adoption lower the total cost of ownership for enterprises, generating concentrated demand for industrial-grade routers, IoT modules, and private network hardware. The allocation of dedicated 4.7 GHz and 28 GHz spectrum bands for private 5G networks has opened a high-value new vector for device demand, moving procurement decisively beyond the consumer segment into smart factory, defense, and critical infrastructure applications.

## Market Restraints

Consumer expectation management is a persistent challenge. Despite rapid subscriber migration, public perception of 5G performance, particularly for millimeter-wave applications, did not fully align with the initial sub-6 GHz deployment reality. This gap can slow the replacement cycle for premium and specialized devices among consumers who do not perceive a sufficiently differentiated experience from their existing hardware.

Supply chain concentration introduces structural risk. Samsung Electronics' dominance across component manufacturing, device production, and distribution creates vertical integration benefits but also concentration exposure. International dependencies on specialized component assembly in Taiwan and China for chip packaging and final assembly of non-Samsung brands add logistical complexity, particularly for just-in-time delivery of custom RF modules required for mmWave-capable devices. Global semiconductor supply constraints exert continuous upward pressure on advanced chipset pricing, which manufacturers manage by prioritizing higher-margin premium devices over entry-level 5G hardware.

## 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. Smartphones represent the highest-volume segment, driven by a domestic culture of rapid technology adoption, aggressive MNO subsidy and bundling programs, and Samsung's continuous flagship launch cadence across Galaxy S-series and foldable device lines. The enterprise and industrial segment is expanding through private 5G network deployments requiring ruggedized industrial tablets, machine-to-machine modules, and high-uplink FWA terminals.

By technology tier, the market segments into Basic, Advanced, and Specialized or

Premium 5G devices. Growth is shifting decisively toward the Advanced and Premium tiers as AR/VR/XR applications and smart factory use cases require devices operating on mmWave or enhanced sub-6 GHz bands with URLLC capabilities. The Healthcare and Smart Cities and Public Sector end-user segments represent additional demand pools as the 5G+ Strategy mandates digital transformation across public services and medical infrastructure.

### Competitive and Strategic Outlook

The South Korean 5G device market operates as an oligopoly in the consumer sphere and a specialized integrated ecosystem in the B2B segment. Samsung Electronics holds a uniquely dominant position, functioning simultaneously as the leading smartphone vendor, a major global semiconductor and display supplier, and a network solutions provider. This vertical integration enables Samsung to offer end-to-end 5G solutions across both consumer and enterprise channels. In October 2024, Samsung and KT Corporation were jointly selected to deploy a private 5G Standalone network for the Republic of Korea Navy's Smart Naval Port project, supplying Compact Core and radio solutions on the 4.7 GHz band for defense communications, digital twins, and intelligent security monitoring.

KT Corporation reinforces its strategic position as both a major downstream distributor and an enterprise 5G enabler, bundling high-value connectivity plans with device subsidies to sustain long-term subscriber retention. Its 5G Super Plan structure and targeted promotional offerings, such as the April 2024 5G Welcome plans for international users, directly stimulate device adoption across specific demographics. LG Uplus and SK Telecom complete the MNO competitive structure, each competing on network quality benchmarks enforced through the Ministry of Science and ICT's semiannual service inspection regime.

### Key Takeaways

The South Korean 5G device market is well-positioned for continued expansion through 2031, underpinned by a mature yet still-evolving network infrastructure, government-mandated enterprise digitalization, and Samsung's integrated dominance across device and network layers. The shift from consumer volume growth toward high-value enterprise and specialized device demand will define the next phase of market development, with private 5G network deployments across industrial, defense, and public sector verticals forming the primary incremental growth engine.

## 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.

**Caters to a Wide Audience:** Suitable for startups, research institutions, consultants, SMEs, and large enterprises.

## What businesses use our reports for

Industry and market insights, opportunity assessment, product demand forecasting, market entry strategy, geographical expansion, capital investment decisions, regulatory analysis, new product development, and competitive intelligence.

## Report Coverage

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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