

Global Open vRAN Market Growth (Status and Outlook) 2026-2032

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Abstracts

The global Open vRAN market size is predicted to grow from US\$ 294 million in 2025 to US\$ 698 million in 2032; it is expected to grow at a CAGR of 13.4% from 2026 to 2032.

Open vRAN (virtual radio access network) is a radio access network architecture based on network function virtualization (NFV) and software-defined networking (SDN) technologies. Its core approach is to decouple hardware and software, virtualizing the baseband processing unit (BBU) functions in traditional base stations and running them on general-purpose servers or cloud platforms. Open vRAN emphasizes standardized interfaces and open protocols, supporting interoperability among multi-vendor equipment and reducing reliance on a single vendor. This architecture dynamically adjusts network functions through software upgrades, improving network flexibility and scalability while reducing hardware costs and operational complexity, providing more efficient solutions for 5G and future communication networks. The industry's gross profit margin is approximately 40%.

Market drivers primarily include:

Technological evolution and cost optimization

Maturity of virtualization technology: NFV (Network Function Virtualization) decouples RAN software from hardware, reducing CAPEX by 40% and OPEX by 30%.

Adoption of general-purpose hardware: Improved x86 server performance, combined with DPU acceleration, meets the real-time requirements of vRAN.

Demand-side: 5G networks' demand for high bandwidth and low latency is driving vRAN

deployment, particularly in dense urban areas and industrial internet scenarios. Vertical industries (such as smart transportation and telemedicine) demand for customized networks is prompting operators to adopt open architectures for rapid service delivery.

Supply-side: The maturity of virtualization technology reduces hardware dependency, and the widespread adoption of NFV and SDN makes vRAN deployment more flexible. Open source communities (such as the O-RAN Alliance) promote interface standardization, accelerate the formation of a multi-vendor ecosystem, and reduce integration costs.

Policy-side: The global "dual carbon" goals are driving green communications, and vRAN is receiving policy support due to its energy efficiency advantages. Some countries are requiring operators to adopt open architectures to reduce reliance on a single supplier, further stimulating market demand. Localized Production: Countries like India and Brazil are promoting local manufacturing of vRAN equipment to reduce import dependence.

The open vRAN market is undergoing a transition from "technology verification" to "large-scale commercialization," driven by a convergence of technological evolution, operator transformation, and policy initiatives. Enterprises must focus on hardware acceleration, AI integration, and ecosystem development to seize strategic advantages in 5G private networks, edge computing, and 6G innovation, ultimately reshaping the global communications industry landscape.

This report presents a comprehensive overview, market shares, and growth opportunities of Open vRAN market by product type, application, key players and key regions and countries.

Segmentation by Type:

Hardware

Software and Services

Segmentation by Application:

Indoor Base Station

Outdoor Base Station

This report also splits the market by region:

United States

China

Europe

Other regions

Japan

South Korea

Southeast Asia

Rest of world

The report also presents the market competition landscape and a corresponding detailed analysis of the major players in the market. The key players covered in this report:

Mavenir

NEC

Samsung

Fujitsu

Qualcomm

Altistar

Nokia

Ericsson

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