

5G In Defense Market Outlook 2025-2034: Market Share, and Growth Analysis By Communication Infrastructure (Small cell, Macro Cell, Radio Access Network (RAN)), By Core Network Technology (Software-defined Networking (SDN), Fog Computing (FC), Mobile Edge Computing (MEC), Network Functions Virtualization (NFV)), By Network Type, By End Use

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Abstracts

The 5G In Defense Market is valued at USD 326.9 million in 2025 and is projected to grow at a CAGR of 51.1% to reach USD 13445.3 million by 2034. The 5G in defense market is a specialized sector focused on leveraging 5G technology to enhance military operations and capabilities. This market involves the deployment of 5G networks and devices for applications such as secure communications, battlefield awareness, autonomous vehicles, and remote operations. 5G offers significant advantages in terms of high-speed data transfer, low latency, and enhanced connectivity, which are crucial for modern military operations.

The market is characterized by a focus on security, reliability, and interoperability. The development of secure 5G networks with robust encryption and authentication protocols is driving the market forward. The integration of AI and machine learning is also enhancing situational awareness and decision-making. Furthermore, the increasing adoption of edge computing is enabling real-time data processing and analysis at the tactical edge. The market is also seeing a trend towards private 5G networks, which provide dedicated and secure connectivity for military applications.

Geographically, the 5G in defense market is concentrated in countries with advanced military capabilities and strong technological infrastructure. Developed nations are leading the way in technology adoption, driven by their investments in defense modernization and innovation. The market's future is promising, with continuous innovation and increasing adoption expected to transform military operations.

Key Insights 5G In Defense Market

Secure 5G Networks: Development of secure 5G networks with robust encryption and authentication.

AI-Enhanced Situational Awareness: Integration of AI for real-time data analysis and decision-making.

Edge Computing: Deployment of edge computing for real-time data processing at the tactical edge.

Private 5G Networks: Adoption of private 5G networks for dedicated and secure connectivity.

Autonomous Systems: Use of 5G for autonomous vehicles, drones, and robots.

Enhanced Communication Capabilities: Demand for high-speed and reliable communication in military operations.

Improved Situational Awareness: Need for real-time data analysis and situational awareness.

Autonomous Operations: Desire for autonomous vehicles and systems to reduce human risk.

Cybersecurity Threats: Need for secure and resilient networks to counter cyber threats.

Modernization of Military Infrastructure: Investments in modernizing military infrastructure with advanced technologies.

Security and Reliability: Ensuring the security and reliability of 5G networks in harsh environments.

Interoperability: Achieving interoperability between different military systems and networks.

Spectrum Availability: Securing dedicated spectrum for military 5G networks.

Ruggedization: Developing ruggedized 5G devices and equipment for military use.

Regulatory Compliance: Meeting regulatory requirements for military communications.

5G In Defense Market Segmentation

By Communication Infrastructure

Small cell

Macro Cell

Radio Access Network (RAN)

By Core Network Technology

Software-defined Networking (SDN)

Fog Computing (FC)

Mobile Edge Computing (MEC)

Network Functions Virtualization (NFV)

By Network Type

Enhanced Mobile Broadband (eMBB)

Ultra-Reliable Low-Latency Communications (URLLC)

Massive Machine Type Communications (MMTC)

By End Use

Military

Homeland Security

Key Companies Analysed

Samsung Electronics Co. Ltd.

AT&T Inc.

Huawei Technologies Co. Ltd.

Raytheon Technologies Corporation

Lockheed Martin Corporation

Qualcomm Technologies Inc.

General Dynamics Corporation

Northrop Grumman Corporation

Honeywell International Inc.

Telefonaktiebolaget LM Ericsson

BAE Systems plc

Nokia Corporation

NEC Corporation

Thales Group Inc.

Leonardo S.p.A.

L3Harris Technologies Inc.

Booz Allen Hamilton Holding Corporation

CACI International Inc.

Elbit Systems Ltd.

Saab AB

Rohde & Schwarz GmbH & Co. KG

Curtiss-Wright Corporation

QinetiQ Group plc

LIG Nex1 Co. Ltd.

Ultra Electronics Holdings plc

Kratos Defense & Security Solutions Inc.

Comtech Telecommunications Corp.

Wind River Systems Inc.

Gilat Satellite Networks Ltd.

Ligado Networks LLC

5G In Defense Market Analytics

The report employs rigorous tools, including Porter's Five Forces, value chain mapping, and scenario-based modeling, to assess supply–demand dynamics. Cross-sector influences from parent, derived, and substitute markets are evaluated to identify risks and opportunities. Trade and pricing analytics provide an up-to-date view of

international flows, including leading exporters, importers, and regional price trends.

Macroeconomic indicators, policy frameworks such as carbon pricing and energy security strategies, and evolving consumer behavior are considered in forecasting scenarios. Recent deal flows, partnerships, and technology innovations are incorporated to assess their impact on future market performance.

5G In Defense Market Competitive Intelligence

The competitive landscape is mapped through OG Analysis' proprietary frameworks, profiling leading companies with details on business models, product portfolios, financial performance, and strategic initiatives. Key developments such as mergers & acquisitions, technology collaborations, investment inflows, and regional expansions are analyzed for their competitive impact. The report also identifies emerging players and innovative startups contributing to market disruption.

Regional insights highlight the most promising investment destinations, regulatory landscapes, and evolving partnerships across energy and industrial corridors.

Countries Covered

North America — 5G In Defense market data and outlook to 2034

United States

Canada

Mexico

Europe — 5G In Defense market data and outlook to 2034

Germany

United Kingdom

France

Italy

Spain

BeNeLux

Russia

Sweden

Asia-Pacific — 5G In Defense market data and outlook to 2034

China

Japan

India

South Korea

Australia

Indonesia

Malaysia

Vietnam

Middle East and Africa — 5G In Defense market data and outlook to 2034

Saudi Arabia

South Africa

Iran

UAE

Egypt

South and Central America — 5G In Defense market data and outlook to 2034

Brazil

Argentina

Chile

Peru

** We can include data and analysis of additional countries on demand.*

Research Methodology

This study combines primary inputs from industry experts across the 5G In Defense value chain with secondary data from associations, government publications, trade databases, and company disclosures. Proprietary modeling techniques, including data triangulation, statistical correlation, and scenario planning, are applied to deliver reliable market sizing and forecasting.

Key Questions Addressed

What is the current and forecast market size of the 5G In Defense industry at global, regional, and country levels?

Which types, applications, and technologies present the highest growth potential?

How are supply chains adapting to geopolitical and economic shocks?

What role do policy frameworks, trade flows, and sustainability targets play in shaping demand?

Who are the leading players, and how are their strategies evolving in the face of global uncertainty?

Which regional “hotspots” and customer segments will outpace the market, and what go-to-market and partnership models best support entry and expansion?

Where are the most investable opportunities—across technology roadmaps, sustainability-linked innovation, and M&A—and what is the best segment to invest over the next 3–5 years?

Your Key Takeaways from the 5G In Defense Market Report

Global 5G In Defense market size and growth projections (CAGR), 2024-2034

Impact of Russia-Ukraine, Israel-Palestine, and Hamas conflicts on 5G In Defense trade, costs, and supply chains

5G In Defense market size, share, and outlook across 5 regions and 27 countries, 2023-2034

5G In Defense market size, CAGR, and market share of key products, applications, and end-user verticals, 2023-2034

Short- and long-term 5G In Defense market trends, drivers, restraints, and opportunities

Porter's Five Forces analysis, technological developments, and 5G In Defense supply chain analysis

5G In Defense trade analysis, 5G In Defense market price analysis, and 5G In Defense supply/demand dynamics

Profiles of 5 leading companies—overview, key strategies, financials, and products

Latest 5G In Defense market news and developments

Additional Support

With the purchase of this report, you will receive

An updated PDF report and an MS Excel data workbook containing all market tables and figures for easy analysis.

7-day post-sale analyst support for clarifications and in-scope supplementary data, ensuring the deliverable aligns precisely with your requirements.

Complimentary report update to incorporate the latest available data and the impact of recent market developments.

** The updated report will be delivered within 3 working days*

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