

Private 5G/4G Network Deployment Tracker & Forecasts: 2023 – 2030

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Abstracts

Historically a niche segment of the wider cellular communications industry, private 5G/4G cellular networks – also referred to as NPNs (Non-Public Networks) in 3GPP terminology – have rapidly gained popularity in recent years due to privacy, security, reliability and performance advantages over public mobile networks and competing wireless technologies as well as their potential to replace hardwired connections with non-obstructive wireless links.

Private cellular networks are continuing their upward trajectory with deployments targeting a multitude of use cases across various industries, ranging from localized wireless systems for dedicated connectivity in factories, warehouses, mines, power plants, substations, offshore wind farms, oil and gas facilities, construction sites, maritime ports, airports, hospitals, office buildings and university campuses to regional and nationwide sub-1 GHz private wireless broadband networks for utilities, FRMCS (Future Railway Mobile Communication System)-ready networks for train-to-ground communications, and hybrid government-commercial public safety LTE networks, as well as rapidly deployable systems such as the German Armed Forces' ZNV (Deployable Cellular Networks) solution, Hsinchu City Fire Department's satellite-backhauled portable 5G network for emergency communications and BBC's (British Broadcasting Corporation) temporary private 5G network used during King Charles' coronation. Custom-built cellular networks have also been implemented in locations as remote as Antarctica and there are even plans for installations on the moon's surface and outer space.

SNS Telecom & IT estimates that global spending on private 5G and 4G LTE network infrastructure for vertical industries will grow at a CAGR of approximately 18% between 2023 and 2026, eventually accounting for more than \$6.4 Billion by the end of 2026. As

much as 40% of these investments – nearly \$2.8 Billion – will be directed towards the build-out of standalone private 5G networks that will become the predominant wireless communications medium to support the ongoing Industry 4.0 revolution for the digitization and automation of manufacturing and process industries. This unprecedented level of growth is likely to transform private cellular networks into an almost parallel equipment ecosystem to public mobile operator infrastructure in terms of market size by the late 2020s.

The 'Private 5G/4G Network Deployment Tracker & Forecasts: 2023 – 2030' datasheet includes an extensive database of more than 6,400 global private 5G/4G network engagements across 120 countries – as of Q4'2023. In addition, it provides global and regional market size forecasts from 2023 to 2030. The forecasts cover three infrastructure submarkets, two technology generations, four spectrum licensing models, 15 vertical industries and five regional markets.

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