

# 4G Equipment Market Forecasts to 2034 – Global Analysis By Component (Infrastructure Equipment and Testing Equipment), Product Type, Application, End User and By Geography

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## Abstracts

According to Statistics MRC, the Global 4G Equipment Market is accounted for \$156.0 billion in 2026 and is expected to reach \$543.8 billion by 2034 growing at a CAGR of 16.9% during the forecast period. The 4G equipment sector includes vital devices and hardware that support fourth-generation mobile networks, such as antennas, base stations, routers, and modems. These tools provide high-speed data, expanded network reach, and smooth connectivity for smartphones, IoT gadgets, and tablets. Growing mobile internet demand and digital service adoption push telecom providers to upgrade infrastructure continuously. Market expansion is fueled by more smartphone users, mobile broadband growth, and the necessity for fast, reliable communication. Top manufacturers emphasize innovative 4G solutions that optimize spectrum efficiency and deliver superior user performance.

According to the International Telecommunication Union (ITU), by 2025 mobile broadband penetration reached 99.4 subscriptions per 100 inhabitants globally, and LTE/WiMAX (4G) networks covered 92.7% of the world's population, underscoring the central role of 4G equipment within the broader mobile broadband infrastructure market.

Market Dynamics:

Driver:

Rising smartphone adoption

The global rise in smartphone usage is a significant factor driving the 4G equipment market. Increasing mobile internet consumption for communication, entertainment, and digital services requires telecom operators to strengthen infrastructure. This leads to greater demand for antennas, routers, base stations, and modems supporting 4G networks. Network providers focus on expanding and modernizing 4G systems to offer uninterrupted high-speed connectivity. As more consumers in urban and rural regions adopt smartphones, the need for reliable 4G hardware intensifies, further boosting market growth.

#### Restraint:

##### Intense competition from 5g deployment

The fast expansion of 5G networks limits the growth of the 4G equipment market. Telecom companies are directing resources and investments toward 5G infrastructure, which delivers higher speeds, lower latency, and advanced network features. This focus can decrease demand for 4G equipment and slow upgrades to existing 4G systems. Regions prioritizing 5G over 4G expansion reduce revenue opportunities for 4G hardware manufacturers. As 5G coverage grows, telecom operators may postpone 4G infrastructure investments. Competition from emerging 5G technologies therefore acts as a key restraint, challenging sustained growth in the 4G equipment sector.

#### Opportunity:

##### Demand for mobile broadband in rural areas

Growing demand for mobile broadband in remote and rural areas creates notable opportunities in the 4G equipment market. Many locations still lack adequate high-speed connectivity, necessitating additional antennas, routers, and base stations. Telecom operators aim to expand coverage to support education, healthcare, and digital government services, bridging the digital gap. This expansion allows equipment manufacturers to access untapped markets while contributing to regional development. Supportive government programs and incentives further accelerate infrastructure deployment, positioning rural broadband initiatives as a major growth opportunity for the 4G equipment sector.

#### Threat:

##### Intense market competition

Strong competition in the telecom equipment industry threatens 4G equipment providers' profitability. Many global and regional players compete on pricing, leading to margin reductions. Continuous R&D investment is necessary to remain competitive, raising operational expenses. New entrants with innovative or cost-efficient solutions can disrupt established market dynamics. Smaller manufacturers may be forced out due to competitive pressures. Consequently, intense rivalry can restrict growth, reduce market share, and challenge 4G equipment vendors financially as they attempt to sustain their position in an increasingly competitive environment.

#### Covid-19 Impact:

The COVID-19 crisis impacted the 4G equipment market in several ways. While lockdowns caused supply chain disruptions and delayed equipment production and deployment, the demand for high-speed mobile networks surged due to remote work, online learning, e-commerce, and telehealth services. Operators experienced temporary investment slowdowns but recognized the critical need for resilient 4G infrastructure. The pandemic underscored the importance of reliable connectivity for digital activities, driving long-term growth potential. Despite short-term operational challenges, the 4G equipment market emerged stronger, with accelerated digital adoption globally boosting the demand for advanced 4G network solutions.

The infrastructure equipment segment is expected to be the largest during the forecast period

The infrastructure equipment segment is expected to account for the largest market share during the forecast period. Comprising essential components like base stations, antennas, routers, and transmission systems, it forms the core of 4G networks. Operators emphasize the deployment and enhancement of these elements to deliver high-speed connectivity and extensive coverage. Rising mobile broadband demand, smart phone adoption, and network expansion in underserved regions fuel infrastructure equipment usage. Vendors provide scalable and reliable solutions to manage increasing data traffic, ensuring efficient network performance. Consequently, infrastructure equipment remains the primary driver of 4G network operations and market growth worldwide.

The IoT & M2M applications segment is expected to have the highest CAGR during the forecast period

Over the forecast period, the IoT & M2M applications segment is predicted to witness the highest growth rate. Increasing use of connected devices such as smart home systems, wearables, industrial IoT, and connected vehicles drives the need for stable, high-speed 4G networks. Operators are upgrading infrastructure with advanced routers, antennas, and base stations to meet the low-latency and high-data requirements of these applications. Expanding IoT adoption in both consumer and industrial sectors boosts demand for reliable connectivity. Equipment providers are focusing on solutions that enable seamless device integration, efficient data handling, and strong network performance, accelerating market growth.

Region with largest share:

During the forecast period, the Asia-Pacific region is expected to hold the largest market share, fueled by widespread smartphone adoption, expanding mobile broadband, and ongoing network development. Major markets like China, India, and Japan drive the demand for base stations, antennas, routers, and other essential 4G infrastructure. Telecom investments, government support, and growing digital service usage strengthen the region's market position. With a large and increasingly connected population, the need for reliable high-speed 4G networks continues to rise. Consequently, Asia-Pacific serves as a vital center for 4G equipment deployment, attracting manufacturers and influencing global market dynamics.

Region with highest CAGR:

Over the forecast period, the North America region is anticipated to exhibit the highest CAGR. Growth in this region is fueled by continuous enhancement of LTE networks, strong enterprise demand for reliable mobile connectivity, and the integration of advanced technologies like LTE-Advanced Pro. Even with mature infrastructure, operators are investing in upgrades and hybrid 4G/5G systems to maintain service quality and expand coverage, particularly in underserved areas. These factors, along with sustained market demand and technological development, drive faster regional market growth compared to other geographies.

Key players in the market

Some of the key players in 4G Equipment Market include Huawei Technologies Co., Ltd., Nokia Corporation, Ericsson, ZTE Corporation, Samsung Electronics Co., Ltd., Cisco Systems, Inc., NEC Corporation, Fujitsu Limited, Juniper Networks, Inc., CommScope Holding Company, Inc., Tejas Networks, Telrad Networks, Mavenir

Systems, Inc., Airspan Networks Inc., Ceragon Networks Ltd., Infinera Corporation, Ciena Corporation and ADTRAN, Inc.

#### Key Developments:

In November 2025, Nokia (NOK) announced a new five-year contract extension with its strategic partner, Telefonica (TEF) Germany to modernize and upgrade its nationwide radio access network until 2030. The agreement includes Nokia's advanced Cloud RAN solutions and supports Telefonica's ambitions for rapid 5G expansion and sustainable digitalization across Germany.

In October 2025, Ericsson and e& have entered a multi-year agreement to upgrade e& UAE's 5G Core Network by deploying Ericsson's advanced cloud-native technologies. The agreement, made at GITEX GLOBAL 2025, encompasses the modernization of core network applications from Ericsson's dual-mode 5G Core solution, such as the Unified Data Management (UDM), IP Multimedia Subsystem (IMS), User Data Consolidation (UDC) and Ericsson Secure Entitlement Server (SES) on e& UAE's network, running on a combination of Ericsson Cloud Native Infrastructure Solution and e&'s own cloud.

In March 2025, Huawei and the Netherlands' Sona signed a strategic cooperation agreement. According to the agreement, the two parties will cooperate closely in the secure access service edge (SASE) field to jointly develop products, build a more intelligent network security system for enterprises worldwide, and share the SASE market. Sonia Harjani, founder of Sona, and Vincent Liu from President of Global Enterprise Network Marketing and Sales Dept, Huawei, attended the signing ceremony.

#### Components Covered:

Infrastructure Equipment

Testing Equipment

#### Product Types Covered:

Base Station Equipment

Core Network Equipment

Backhaul Equipment

Network Management Systems

Applications Covered:

LTE

Mobile Broadband

Fixed Wireless Access

IoT & M2M Applications

End Users Covered:

Telecommunications Operators

Enterprises

Government Organizations

Logistics

Regions Covered:

North America

United States

Canada

Mexico

Europe

United Kingdom

Germany

France

Italy

Spain

Netherlands

Belgium

Sweden

Switzerland

Poland

Rest of Europe

Asia Pacific

China

Japan

India

South Korea

Australia

Indonesia

Thailand

Malaysia

Singapore

Vietnam

Rest of Asia Pacific

South America

Brazil

Argentina

Colombia

Chile

Peru

Rest of South America

Rest of the World (RoW)

Middle East

Saudi Arabia

United Arab Emirates

Qatar

Israel

Rest of Middle East

Africa

South Africa

Egypt

Morocco

Rest of Africa

What our report offers:

Market share assessments for the regional and country-level segments

Strategic recommendations for the new entrants

Covers Market data for the years 2023, 2024, 2025, 2026, 2027, 2028, 2030, 2032 and 2034

Market Trends (Drivers, Constraints, Opportunities, Threats, Challenges, Investment Opportunities, and recommendations)

Strategic recommendations in key business segments based on the market estimations

Competitive landscaping mapping the key common trends

Company profiling with detailed strategies, financials, and recent developments

Supply chain trends mapping the latest technological advancements

Free Customization Offerings:

All the customers of this report will be entitled to receive one of the following free customization options:

Company Profiling

Comprehensive profiling of additional market players (up to 3)

SWOT Analysis of key players (up to 3)

Regional Segmentation

Market estimations, Forecasts and CAGR of any prominent country as per the client's interest (Note: Depends on feasibility check)

Competitive Benchmarking

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