

5G Customer Premises Equipment Market - Global Industry Size, Share, Trends, Opportunity, and Forecast, Segmented By Equipment Type (Modem, Router, Fixed Wireless Access Gateway, Mobile Hotspot, Integrated Access Device, Extender/Repeater, Others), By Application (High-Speed Internet Access, Smart Homes, Remote Work & Telecommuting, IoT Connectivity, VR & AR, Edge Computing, Security & surveillance, Rural Broadband Connectivity, Others), By End User Vertical (Education, Government, Industrial, IT & Telecom, Others), By Region & Competition, 2021-2031F

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Abstracts

The Global 5G Customer Premises Equipment Market is projected to expand significantly, growing from USD 42.46 Billion in 2025 to USD 169.02 Billion by 2031 at a CAGR of 25.89%. This market involves specialized routers and gateways that capture 5G signals to provide high-speed internet access for homes and businesses. The primary catalyst for this growth is the widespread deployment of Fixed Wireless Access (FWA) as a cost-effective alternative to wired broadband in rural and underserved areas where fiber installation is economically unfeasible, alongside the increasing adoption of private 5G networks for enterprise automation.

However, the market faces a substantial challenge regarding the high unit cost of devices. The price premium of 5G CPE compared to legacy 4G LTE models continues

to impede mass adoption, particularly in cost-sensitive emerging markets. Despite these financial barriers, the sector is scaling up; according to the Global mobile Suppliers Association, global shipments of 5G-enabled Fixed Wireless Access customer premises equipment reached 16.8 million units in 2024, demonstrating the industry's growth momentum.

Market Driver

The surging adoption of 5G Fixed Wireless Access (FWA) acts as the primary engine driving the Customer Premises Equipment market, as telecommunications operators increasingly utilize wireless architectures to deliver gigabit-class broadband. This shift allows service providers to bypass the high costs of last-mile fiber deployment, creating a demand for specialized gateways that convert cellular signals into robust Wi-Fi networks for residential and commercial use. Consequently, hardware procurement is accelerating as subscribers migrate from legacy copper or slow DSL connections to high-speed wireless options; Ericsson's June 2024 'Mobility Report' projects that global FWA connections will reach 330 million by the end of 2029, with 5G technology dominating this growth.

Simultaneously, the worldwide expansion of commercial 5G infrastructure is broadening the addressable market for compatible premises equipment. As carriers densify networks and activate Standalone 5G cores, the footprint for reliable high-speed wireless internet extends beyond urban centers into suburban and rural regions, increasing the potential user base for 5G routers. Data from 5G Americas in September 2024 shows that global 5G connections exceeded 2 billion in the second quarter, reflecting massive infrastructure scaling that enables more providers to enter the home broadband market, with the Global mobile Suppliers Association identifying launched FWA services from 494 operators across 176 countries in 2024.

Market Challenge

The elevated unit cost of 5G Customer Premises Equipment poses a significant hurdle to market growth, particularly in developing economies where price sensitivity is high. Manufacturers contend with substantial production expenses driven by the complexity of advanced 5G chipsets and radio frequency components, resulting in retail prices that exceed those of mature 4G LTE models. This price premium compels network operators to either absorb heavy subsidy costs or transfer the expense to end-users, shrinking the addressable market and causing many providers to delay widespread 5G deployments in favor of more affordable legacy alternatives.

This economic friction persists as a major barrier to mass adoption. According to the Global mobile Suppliers Association in 2024, 40 percent of surveyed vendors predicted that price parity between 5G and 4G customer premises equipment would likely not be achieved until 2026. This delay in cost convergence suggests that the financial gap will continue to restrict the competitive viability of 5G hardware against older technologies in the near future, directly suppressing shipment volumes in cost-conscious market segments.

Market Trends

The adoption of 5G RedCap technology is emerging as a pivotal trend for improving the cost-efficiency of Fixed Wireless Access hardware. By streamlining device complexity through reduced antenna configurations and lower bandwidth needs, RedCap facilitates the production of 5G routers that are significantly more affordable than full-performance eMBB models while still outperforming legacy LTE. This evolution enables manufacturers to lower material costs, directly addressing affordability barriers in price-sensitive markets; indeed, the Global mobile Suppliers Association's August 2024 survey indicated that 63 percent of vendors planned to launch a 5G RedCap CPE product within the year.

Concurrently, the transition to 5G Standalone (SA) architecture is becoming a standard requirement for next-generation gateways to support advanced network features. Unlike Non-Standalone models that rely on 4G anchors, SA-compliant equipment connects directly to the 5G core, unlocking capabilities such as network slicing and ultra-low latency that are essential for enterprise-grade service agreements. This architectural shift ensures hardware can fully leverage programmable networks for industrial applications, with the Global mobile Suppliers Association projecting in August 2024 that shipments of 5G Standalone-capable customer premises equipment would reach 8.9 million units for the year.

Key Market Players

Huawei Technologies Co., Ltd.

Ericsson Group

Nokia Corporation

Samsung Electronics Co., Ltd.

ZTE Corporation

CommScope, Inc.

Technicolor Group SA

Sagemcom Broadband SAS

Motorola Solutions, Inc.

Gemtek Technology Co., Ltd.

Report Scope

In this report, the Global 5G Customer Premises Equipment Market has been segmented into the following categories, in addition to the industry trends which have also been detailed below:

5G Customer Premises Equipment Market, By Equipment Type

Modem

Router

Fixed Wireless Access Gateway

Mobile Hotspot

Integrated Access Device

Extender/Repeater

Others

5G Customer Premises Equipment Market, By Application

High-Speed Internet Access

Smart Homes

Remote Work & Telecommuting

IoT Connectivity

VR & AR

Edge Computing

Security & surveillance

Rural Broadband Connectivity

Others

5G Customer Premises Equipment Market, By End User Vertical

Education

Government

Industrial

IT & Telecom

Others

5G Customer Premises Equipment Market, By Region

North America

United States

Canada

Mexico

Europe

France

United Kingdom

Italy

Germany

Spain

Asia Pacific

China

India

Japan

Australia

South Korea

South America

Brazil

Argentina

Colombia

Middle East & Africa

South Africa

Saudi Arabia

UAE

Competitive Landscape

Company Profiles: Detailed analysis of the major companies present in the Global 5G Customer Premises Equipment Market.

Available Customizations:

Global 5G Customer Premises Equipment Market report with the given market data, TechSci Research offers customizations according to a company's specific needs. The following customization options are available for the report:

Company Information

Detailed analysis and profiling of additional market players (up to five).

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