

5G New Radio Market – Global Industry Size, Share, Trends, Opportunity, and Forecast, Segmented By Offering (Hardware, Software, Services), By Operating Frequency (Sub-6 GHz, mmWave), By Architecture (Non-Standalone (NSA), Standalone (SA)), By Application (Enhanced Mobile Broadband (eMBB), Ultra-reliable Low-Latency Communications (URLLC), Massive Machine-type Communications (mMTC)), By Industry (Telecom & IT, Manufacturing, Automotive, Healthcare, Retail, Others), By Region, By Competition, 2018-2028.

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Abstracts

Global 5G New Radio Market has valued at USD 34 Billion in 2022 and is anticipated to project robust growth in the forecast period with a CAGR of 28.4% through 2028. The global 5G New Radio (NR) market is currently experiencing significant growth and transformation, driven by the ever-increasing demand for faster, more reliable, and low-latency wireless communication networks. As the fifth generation of mobile network technology, 5G NR represents a pivotal advancement in the telecommunications industry. It offers a wide array of benefits, including exponentially higher data transfer speeds, reduced network latency, and enhanced capacity to accommodate the burgeoning Internet of Things (IoT) ecosystem.

The adoption of 5G NR is propelled by various factors, including the proliferation of bandwidth-intensive applications such as augmented reality (AR), virtual reality (VR), autonomous vehicles, and smart cities. Telecommunications providers are aggressively

investing in infrastructure upgrades to deploy 5G networks, and device manufacturers are producing a growing number of 5G-compatible smartphones and other connected devices.

Moreover, industries such as healthcare, manufacturing, and transportation are embracing 5G NR to enable innovations like remote surgery, smart factories, and autonomous transportation systems. With these developments, the global 5G NR market is poised for sustained growth, creating opportunities for businesses across multiple sectors to leverage the transformative power of 5G technology for their operations and services.

Key Market Drivers

Increasing Demand for High-Speed Connectivity

The global 5G New Radio (NR) market is being propelled by the increasing demand for high-speed connectivity. As data-intensive applications like video streaming, online gaming, and virtual reality continue to proliferate, there is a growing need for faster and more reliable network connections. This is where 5G NR technology comes into play, offering significantly higher data transfer speeds compared to previous generations of wireless networks. With its enhanced capabilities, 5G NR enables seamless and immersive user experiences, revolutionizing the way we consume and interact with digital content.

The demand for high-speed connectivity is driven by the exponential growth of data-intensive applications. Video streaming platforms like Netflix and YouTube have become immensely popular, with users expecting high-definition content on-demand. Additionally, online gaming has evolved into a massive industry, with multiplayer games requiring low latency and high bandwidth to ensure smooth gameplay. Virtual reality (VR) and augmented reality (AR) applications are also gaining traction, offering immersive experiences that demand high-speed connectivity for real-time rendering and interaction. These data-intensive applications require networks that can handle the massive amounts of data being transmitted, and 5G NR technology provides the necessary bandwidth and speed to meet these demands.

5G NR technology offers several advantages over previous wireless network generations. It operates on higher frequency bands, allowing for wider bandwidth and faster data transfer speeds. This enables users to download and upload content at unprecedented rates, reducing buffering times and enhancing the overall user

experience. The low latency of 5G NR networks ensures minimal delay in data transmission, making real-time applications like online gaming and video conferencing more responsive and immersive. Moreover, 5G NR networks have the capacity to support a significantly higher number of connected devices simultaneously, making them ideal for the growing Internet of Things (IoT) ecosystem.

The demand for high-speed connectivity is expected to continue growing as more data-intensive applications emerge and user expectations rise. The global 5G NR market is poised to capitalize on this demand, offering faster and more reliable network connections that can support the evolving digital landscape. With its ability to deliver seamless and immersive user experiences, 5G NR technology is set to revolutionize the way we consume and interact with digital content, opening up new possibilities for industries and individuals alike.

Growing Internet of Things (IoT) Ecosystem

The growth of the Internet of Things (IoT) ecosystem is a significant driver of the 5G New Radio (NR) market. As more devices become connected and communicate with each other, there is a pressing need for a robust network infrastructure that can handle the massive volume of data generated by these devices. In this context, 5G NR technology emerges as a crucial enabler, providing the necessary bandwidth and low latency required to support the seamless and real-time communication between IoT devices.

The expansion of the IoT ecosystem is driven by the increasing number of connected devices across various industries and sectors. From smart homes and wearable devices to industrial machinery and smart cities, the proliferation of IoT devices is transforming the way we live and work. These devices generate a vast amount of data that needs to be transmitted, processed, and analyzed in real-time. 5G NR technology addresses this challenge by offering significantly higher bandwidth compared to previous wireless network generations. This increased bandwidth allows for the efficient transfer of large volumes of data, enabling IoT devices to communicate seamlessly and exchange information in real-time.

Low latency is another critical requirement for the IoT ecosystem, as many IoT applications rely on real-time data processing and decision-making. 5G NR technology provides ultra-low latency, reducing the delay in data transmission and enabling near-instantaneous communication between devices. This low latency is essential for applications such as autonomous vehicles, remote healthcare monitoring, and industrial

automation, where even a slight delay in data transmission can have significant consequences. With 5G NR, IoT devices can communicate and respond to each other's signals rapidly, facilitating efficient and synchronized operations.

Furthermore, 5G NR networks have the capacity to support a massive number of connected devices simultaneously. This scalability is crucial for the IoT ecosystem, as the number of connected devices is expected to grow exponentially in the coming years. With 5G NR, IoT networks can accommodate the increasing demand for connectivity, ensuring that devices can seamlessly communicate and share data without congestion or performance degradation.

Enhanced Mobile Broadband (eMBB) Applications

The adoption of 5G New Radio (NR) technology is being driven by the increasing demand for enhanced mobile broadband (eMBB) applications. As high-definition video streaming, augmented reality (AR), and cloud gaming gain popularity, there is a growing need for networks that can deliver high-quality content with minimal latency. 5G NR technology addresses this demand by offering faster download and upload speeds, reduced latency, and improved network capacity, making it the ideal solution for eMBB applications.

The demand for enhanced mobile broadband applications is fueled by the increasing consumption of high-definition video content. Platforms like Netflix, YouTube, and other streaming services have revolutionized the way we consume media, with users expecting seamless playback of high-quality videos on their mobile devices. 5G NR technology provides significantly faster download speeds, allowing users to stream high-definition content without buffering or interruptions. Moreover, the improved network capacity of 5G NR enables multiple users to stream content simultaneously, even in densely populated areas, ensuring a smooth and uninterrupted streaming experience for all.

Augmented reality is another eMBB application that is gaining traction across various industries. AR applications overlay digital information onto the real world, enhancing user experiences in fields such as gaming, education, healthcare, and retail. These applications require low latency and high bandwidth to deliver real-time and immersive AR experiences. 5G NR technology offers reduced latency, enabling instant responsiveness and interaction in AR applications. Additionally, the faster download speeds of 5G NR allow for quick access to AR content, enhancing the overall user experience.

Cloud gaming is yet another eMBB application that is on the rise. With cloud gaming, users can stream and play high-quality games directly from the cloud, eliminating the need for expensive gaming hardware. This requires a network that can deliver low-latency, high-bandwidth connections to ensure a smooth and lag-free gaming experience. 5G NR technology provides the necessary infrastructure to support cloud gaming, offering reduced latency and faster download speeds, allowing gamers to enjoy high-quality gaming experiences on their mobile devices.

Industry 4.0 and Digital Transformation

The 5G New Radio (NR) market is being driven by the ongoing digital transformation across industries, known as Industry 4.0. This transformation is characterized by the adoption of advanced technologies to enable automation, remote monitoring, and real-time data analytics. Industries such as manufacturing, transportation, healthcare, and logistics are leveraging 5G NR technology to facilitate these advancements. The ultra-low latency and high reliability of 5G NR networks play a crucial role in supporting mission-critical applications and ensuring the seamless integration of machines and systems.

In the manufacturing industry, 5G NR technology is revolutionizing production processes by enabling automation and connectivity. With 5G NR networks, machines and robots can communicate and collaborate in real-time, leading to increased efficiency, productivity, and flexibility. The ultra-low latency of 5G NR ensures that critical commands and data are transmitted instantaneously, allowing for precise control and synchronization of manufacturing operations. Moreover, the high reliability of 5G NR networks ensures uninterrupted connectivity, minimizing downtime and optimizing production processes.

In the transportation sector, 5G NR is driving the development of intelligent transportation systems. With its low latency and high reliability, 5G NR enables real-time communication between vehicles, infrastructure, and traffic management systems. This facilitates the implementation of advanced driver assistance systems, traffic optimization, and vehicle-to-vehicle communication, enhancing road safety and efficiency. Additionally, 5G NR networks support the seamless integration of autonomous vehicles, enabling them to communicate and make split-second decisions based on real-time data.

In the healthcare industry, 5G NR technology is transforming patient care and remote

monitoring. With its ultra-low latency, healthcare professionals can remotely monitor patients in real-time, enabling timely interventions and reducing the need for hospital visits. 5G NR networks also support the transmission of high-resolution medical imaging and enable telemedicine applications, facilitating remote consultations and improving access to healthcare services. The high reliability of 5G NR ensures secure and uninterrupted connectivity, critical for transmitting sensitive patient data.

In the logistics sector, 5G NR is enhancing supply chain management and warehouse operations. With its low latency and high reliability, 5G NR enables real-time tracking and monitoring of goods, optimizing inventory management and improving logistics efficiency. The seamless integration of machines and systems through 5G NR networks enables automated processes such as robotic picking and sorting, reducing human error and increasing operational efficiency.

Government Initiatives and Investments

Government initiatives and investments are playing a pivotal role in propelling the adoption of 5G New Radio (NR) technology. Numerous countries are actively investing in the development of 5G infrastructure as part of their strategic plans to stimulate economic growth, enhance connectivity, and improve competitiveness on a global scale. Governments are also implementing policies and regulations that aim to facilitate the deployment of 5G networks, thereby creating a favorable environment for the growth of the 5G NR market.

Governments worldwide recognize the transformative potential of 5G NR technology and its ability to revolutionize various sectors. As a result, they are committing substantial financial resources to support the development and deployment of 5G infrastructure. These investments are aimed at building robust and reliable networks that can handle the increased data traffic and connectivity demands of the future. By investing in 5G infrastructure, governments are laying the foundation for a digital economy and positioning their countries as leaders in the global technology landscape.

In addition to financial investments, governments are actively involved in shaping the regulatory framework for 5G NR deployment. They are implementing policies and regulations that streamline the process of acquiring spectrum licenses, ensure fair competition among telecom operators, and address security and privacy concerns. By providing a clear and supportive regulatory environment, governments are encouraging private sector investments in 5G NR technology and facilitating the rapid deployment of networks.

Furthermore, governments are collaborating with industry stakeholders, including telecom operators, equipment manufacturers, and research institutions, to drive innovation and accelerate the adoption of 5G NR. They are fostering partnerships and initiatives that promote research and development, pilot projects, and knowledge sharing. These collaborative efforts aim to harness the full potential of 5G NR technology and explore its applications across various sectors, such as smart cities, healthcare, transportation, and agriculture.

Key Market Challenges

Infrastructure Deployment and Coverage

One of the primary challenges in the global 5G NR market is the deployment and coverage of 5G infrastructure. Building a robust and extensive network infrastructure requires significant investments in terms of infrastructure development, including the installation of new base stations, antennas, and fiber optic cables. The challenge lies in the time and cost required to deploy 5G infrastructure, especially in remote or rural areas where the return on investment may be lower. Ensuring widespread coverage and seamless connectivity across different geographical regions is crucial for the success of 5G NR technology.

Spectrum Allocation and Management

Another challenge is the allocation and management of spectrum for 5G NR networks. Spectrum is a limited resource, and the increasing demand for wireless communication services necessitates efficient spectrum allocation. Governments and regulatory bodies play a crucial role in allocating and managing spectrum bands for 5G NR networks. However, the process can be complex and time-consuming, involving coordination among multiple stakeholders and addressing interference issues. Ensuring harmonized spectrum allocation globally is essential for enabling interoperability and maximizing the benefits of 5G NR technology.

Interoperability and Standardization

Interoperability and standardization are critical challenges in the 5G NR market. With multiple vendors and equipment manufacturers involved in the development and deployment of 5G NR networks, ensuring interoperability between different components and systems becomes crucial. Standardization of protocols, interfaces, and network

architectures is necessary to enable seamless communication and compatibility between various 5G NR devices and networks. Lack of interoperability and standardization can lead to fragmentation, increased costs, and limited scalability of 5G NR deployments.

Security and Privacy Concerns

Security and privacy are significant challenges in the 5G NR market. As 5G NR networks handle vast amounts of data and support critical applications, ensuring the confidentiality, integrity, and availability of data becomes paramount. The increased attack surface and potential vulnerabilities in 5G NR networks require robust security measures to protect against cyber threats and unauthorized access. Additionally, privacy concerns arise due to the collection and processing of personal data in 5G NR networks. Implementing stringent security protocols, encryption mechanisms, and privacy regulations is essential to build trust and confidence among users and stakeholders.

Key Market Trends

Growing Demand for 5G NR Technology

The global market for 5G New Radio (NR) technology is experiencing a significant rise in demand as industries recognize the transformative potential of this advanced wireless technology. With its faster data transfer speeds, lower latency, and higher network capacity, 5G NR technology is poised to revolutionize various sectors, including telecommunications, manufacturing, transportation, healthcare, and entertainment. Organizations are increasingly adopting 5G NR technology to unlock new opportunities, improve operational efficiency, and deliver enhanced user experiences.

Integration of 5G NR with Emerging Technologies

The integration of 5G NR technology with emerging technologies is a key trend in the market. Industries are exploring the synergies between 5G NR and technologies such as Internet of Things (IoT), artificial intelligence (AI), augmented reality (AR), and virtual reality (VR). By combining 5G NR with these technologies, organizations can create innovative solutions and applications that leverage the high-speed connectivity, low latency, and massive device connectivity capabilities of 5G NR. This integration opens up possibilities for smart cities, autonomous vehicles, remote surgeries, immersive gaming experiences, and more.

Expansion of 5G NR Infrastructure

The global market is witnessing a significant expansion of 5G NR infrastructure as service providers and network operators invest in building robust networks. This expansion involves the deployment of new base stations, small cells, and fiber optic cables to ensure widespread coverage and capacity. Governments and regulatory bodies are also playing a crucial role in facilitating the deployment of 5G NR infrastructure by allocating spectrum and implementing supportive policies. The expansion of 5G NR infrastructure is essential to meet the increasing demand for high-speed connectivity and enable the seamless integration of various industries.

Focus on Security and Privacy in 5G NR Networks

As 5G NR networks handle sensitive data and support critical applications, there is a growing focus on security and privacy. Organizations and network operators are implementing robust security measures to protect against cyber threats, unauthorized access, and data breaches. Encryption, authentication protocols, and secure network architectures are being deployed to ensure the confidentiality, integrity, and availability of data transmitted over 5G NR networks. Additionally, privacy regulations and frameworks are being developed to address concerns related to the collection, storage, and processing of personal data in 5G NR networks.

Segmental Insights

Offering Insights

The hardware segment dominated the market in 2022 and accounted for more than 57.0% share of the global revenue. The increasing demand for advanced radio units such as massive MIMO and beamforming, which offers better coverage and capacity and help in optimizing resource allocation, is a significant factor contributing to the segment growth. At the same time, the rising adoption of cloud-native architectures and virtualization enables network operators to deliver services more efficiently and at a lower cost. Furthermore, the growing popularity of Internet-of-Things (IoT) and edge computing is driving the demand for specialized hardware such as IoT gateways, edge servers, and routers, thereby contributing to the growth of the segment.

The services segment is projected to witness remarkable growth over the forecast period owing to the increasing adoption of managed services, as operators seek to

outsource non-core activities such as network management and maintenance. This allows them to focus on their core business and achieve cost savings. Additionally, the rise of network slicing allows operators to create multiple virtual networks within a single physical network. This enables them to offer customized services for specific use cases and industries and to optimize network resources. Moreover, with the deployment of 5G networks, there is a growing demand for value-added services such as edge computing, which enables faster processing and lower latency for data-intensive applications. Additionally, the emergence of 5G-enabled applications such as augmented reality, virtual reality, and autonomous vehicles is expected to drive demand for specialized services such as network testing and optimization, as well as security and privacy services.

Operating Frequency Insights

The Sub-6 GHz segment dominated the market in 2022 and accounted for more than 64.0% share of the global revenue. The ability of Sub-6 GHz spectrum bands to offer a good balance between coverage and capacity, making them suitable for providing high-speed connectivity to large numbers of users, is a major factor contributing to the segment growth. With the growth in data traffic, there is a need for higher data rates, lower latency, and improved network efficiency. Additionally, the growing adoption of Massive MIMO technology, which uses many antennas to improve spectral efficiency and increase capacity, is also driving segment growth. This technology can be deployed in the sub-6 GHz spectrum bands to improve network performance and coverage.

The mmWave segment is projected to witness significant growth over the forecast period. With the expansion of 5G networks, the mmWave segment is expected to become more important in the coming years, particularly in urban areas where there is a high demand for high-speed data services. To meet the growing demand for mmWave technology, companies are investing in research and development to improve the performance and reliability of mmWave equipment. The integration of mmWave technology with other technologies such as sub-6 GHz, which allows for a more comprehensive 5G coverage is also driving the segment growth. Additionally, there is a growing focus on improving the energy efficiency of mmWave equipment, which can help reduce the overall operating costs of 5G networks.

Architecture Insights

The Non-Standalone (NSA) segment dominated the market in 2022 and accounted for more than 65.0% share of the global revenue. The ability of 5G NR NSA solutions to

allow operators to deploy 5G radio access technology using the existing 4G LTE core network, enabling faster time-to-market and cost savings, is a major factor contributing to the growth of the segment. With NSA solutions, operators can offer Enhanced Mobile Broadband (eMBB) services and improved network performance while paving the way for future standalone (SA) 5G deployments. Moreover, NSA solutions can support advanced features such as massive MIMO, beamforming, and carrier aggregation. Such factors are further expected to drive the adoption of 5G NR technology and accelerate the deployment of next-generation networks.

The Standalone (SA) segment is projected to expand at the highest CAGR over the forecast period. The deployment of 5G New Radio in standalone mode is gaining popularity in the industry, and it is projected to fuel the growth over the coming years. Standalone mode has various advantages over non-standalone mode, including greater network speed and lower latency. The standalone mode enables network operators to deliver end-to-end 5G services that are not available in the non-standalone mode. The standalone mode also allows for the implementation of sophisticated services like as network slicing and edge computing, which may be utilized for applications such as autonomous driving and smart cities. Furthermore, the growing demand for high-speed internet and the growing number of connected devices are driving the adoption of standalone mode.

Regional Insights

The Asia Pacific region dominated the market in 2022 and accounted for more than 38.0% share of the global revenue. The increasing adoption of 5G technology in countries such as China, Japan, South Korea, and India is a major factor contributing to the regional growth. The region has a large population and a growing number of mobile subscribers, which is driving the demand for high-speed internet services and advanced applications. The governments in these countries are also investing heavily in the development of 5G infrastructure, which is expected to provide significant opportunities for telecom companies and network equipment providers in the region. Additionally, the region is witnessing a significant increase in the use of smartphones and other mobile devices, which is driving the demand for 5G-enabled devices and services.

The North America region is projected to expand at the highest CAGR over the forecast period. Significant investment is being made in the development and implementation of 5G infrastructure in the area, owing to the growing demand for high-speed internet access, IoT applications, and cloud services. Furthermore, the use of technologies such as artificial intelligence, edge computing, and big data analytics is increasing, which is

pushing the demand for high-performance 5G networks. Collaborations between telecom firms and technological behemoths to build and implement 5G networks and services are also developing in the area. In addition, the area has been an early user of 5G-enabled smartphones and other gadgets, which is projected to boost market development in the future years. Furthermore, the region has been an early adopter of 5G-enabled smartphones and other devices, which is expected to further drive the growth of the market in the coming years.

Key Market Players

Huawei Technologies Co., Ltd.

Qualcomm Technologies, Inc

Telefonaktiebolaget LM Ericsson

Samsung

Intel Corporation

Cisco Systems Inc.

Fujitsu

NEC Corporation

Verizon Communications Inc.

Keysight Technologies.

Report Scope:

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

5G New Radio Market, By Offering:

Hardware

Software

Services

5G New Radio Market, By Operating Frequency:

Sub-6 GHz

mmWave

5G New Radio Market, By Architecture:

Non-Standalone (NSA)

Standalone (SA)

5G New Radio Market, By Application:

Enhanced Mobile Broadband (eMBB)

Ultra-reliable Low-Latency Communications (URLLC)

Massive Machine-type Communications (mMTC)

5G New Radio Market, By Industry:

Telecom & IT

Manufacturing

Automotive

Healthcare

Retail

Others

5G New Radio Market, By Region:

North America

United States

Canada

Mexico

Europe

France

United Kingdom

Italy

Germany

Spain

Belgium

Asia-Pacific

China

India

Japan

Australia

South Korea

Indonesia

Vietnam

South America

Brazil

Argentina

Colombia

Chile

Peru

Middle East & Africa

South Africa

Saudi Arabia

UAE

Turkey

Israel

Competitive Landscape

Company Profiles: Detailed analysis of the major companies present in the Global 5G New Radio Market.

Available Customizations:

Global 5G New Radio market report with the given market data, Tech Sci 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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