

5G Services Market - Global Industry Size, Share, Trends, Opportunity, and Forecast, 2018-2028 Segmented By Communication Type (FWA, eMBB, uRLLC, mMTC), By Vertical (Manufacturing, IT & Telecom, BFSI, Others), By End-Use (Smart Cities, Connected Workers, Connected Vehicles, Connected Factories, Smart Buildings, Smart Utilities, Connected Healthcare, Others) By Region, and By Competition

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Abstracts

Global 5G Services Market has valued at USD 62.5 Billion in 2022 and is anticipated to project robust growth in the forecast period with a CAGR of 42.8% through 2028. The Global 5G Services Market is experiencing rapid growth, ushering in a new era of connectivity and technological advancement. 5G, the fifth generation of wireless technology, has emerged as a game-changer, promising significantly faster data speeds, ultra-low latency, and massive device connectivity. These capabilities are driving the adoption of 5G services across various sectors. In the telecommunications industry, 5G is enabling telecom operators to offer enhanced mobile broadband experiences, paving the way for high-definition video streaming, augmented and virtual reality applications, and seamless connectivity in smart cities. Furthermore, 5G is a critical enabler of the Internet of Things (IoT), empowering businesses to connect and manage a multitude of devices, from autonomous vehicles to industrial sensors, with unprecedented efficiency. It also plays a vital role in mission-critical applications such as remote surgery and autonomous drones, where split-second decisions are crucial. As a result, the global 5G services market is witnessing robust expansion, with businesses and consumers alike recognizing the potential for innovation and efficiency that this technology offers. With ongoing infrastructure investments and the rollout of 5G

networks worldwide, the market is poised for sustained growth, shaping the future of connectivity and digital transformation across industries.

Key Market Drivers

Proliferation of 5G Infrastructure

The Global 5G Services Market is experiencing remarkable growth, primarily propelled by the widespread proliferation of 5G infrastructure. With the deployment of 5G networks, telecommunication companies are ushering in an era of ultra-fast, low-latency wireless communication. This transformative technology promises speeds several times faster than its predecessor, 4G, enabling lightning-quick data transfers, seamless streaming, and the support of bandwidth-intensive applications like augmented reality (AR), virtual reality (VR), and autonomous vehicles. Moreover, 5G networks are designed to handle a massive number of connected devices simultaneously, facilitating the Internet of Things (IoT) ecosystem. The expansion of 5G infrastructure is not limited to urban areas; it also extends to rural regions, bridging the digital divide and enhancing connectivity globally. As consumers and businesses alike seek improved network performance and the ability to harness advanced technologies, the demand for 5G services continues to soar, making it a dominant driver in the market.

Rise in Demand for IoT Connectivity

The rising demand for Internet of Things (IoT) connectivity is a significant driver fueling the growth of the Global 5G Services Market. IoT, a network of interconnected devices and sensors, relies on robust and reliable connectivity to function effectively. 5G technology's ability to provide low-latency, high-speed, and scalable connections makes it the ideal choice for powering IoT applications across various industries, including manufacturing, healthcare, agriculture, and smart cities. IoT devices, such as sensors in industrial machinery, medical equipment, and autonomous vehicles, require seamless communication for real-time data transmission and remote monitoring. Additionally, 5G's capacity to handle a multitude of IoT devices simultaneously supports the expansion of smart homes, smart grids, and intelligent transportation systems. As the IoT ecosystem continues to grow and diversify, the demand for 5G services to support these interconnected devices is expected to surge, contributing significantly to market expansion.

Enabling Next-Generation Technologies

5G services play a pivotal role in enabling next-generation technologies, which is driving their increased adoption. Beyond faster data speeds and lower latency, 5G serves as the backbone for transformative innovations. Industries are leveraging 5G to unlock the potential of technologies such as artificial intelligence (AI), augmented reality (AR), virtual reality (VR), and edge computing. For instance, 5G-powered edge computing allows for real-time data processing at the network's edge, reducing latency and enhancing the performance of applications like autonomous vehicles and remote surgery. Additionally, the convergence of 5G and AI enhances machine learning capabilities, enabling more sophisticated applications in areas like predictive maintenance, personalized content recommendations, and autonomous robotics. As these next-generation technologies become integral to various sectors, the demand for 5G services continues to rise, positioning it as a vital driver of market growth.

Global Expansion of Smart Cities

The global expansion of smart cities is contributing significantly to the growth of the Global 5G Services Market. Smart city initiatives aim to improve urban living through the integration of technology into various aspects of city management and services. 5G networks are instrumental in enabling the connectivity required for smart city solutions, such as intelligent traffic management, energy-efficient infrastructure, and real-time public services. With 5G's ability to support a massive number of connected devices, cities can implement IoT-driven solutions to enhance security, reduce congestion, and optimize resource allocation. Additionally, 5G facilitates the deployment of smart sensors and cameras for real-time data collection and analysis, furthering the goals of sustainability and efficiency in urban environments. As more cities worldwide embark on their smart city journeys, the demand for 5G services to underpin these initiatives continues to grow, making it a key driver in the market's expansion.

Enhancing Mobile and Enterprise Connectivity

The quest for enhanced mobile and enterprise connectivity is propelling the growth of the Global 5G Services Market. Beyond individual consumers, businesses are increasingly reliant on robust and high-speed mobile connectivity to support their operations. 5G services offer improved mobile broadband experiences, enabling businesses to leverage cloud-based applications, video conferencing, and remote collaboration seamlessly. Moreover, 5G's low latency and high reliability are critical for applications such as autonomous vehicles and remote-controlled machinery. Enterprises across sectors, from finance to healthcare, are recognizing the advantages of 5G in enhancing productivity, scalability, and competitiveness. As the digital

transformation of businesses continues, the demand for 5G services as a means of staying connected and competitive in the global market is driving its adoption and growth.

Key Market Challenges

Interoperability and Standards Complexity

The Global 5G Services Market grapples with a notable challenge concerning interoperability and standards complexity. The 5G landscape encompasses a myriad of technologies, frequency bands, and standards, leading to a complex ecosystem. Achieving seamless interoperability between different 5G components and equipment poses challenges, particularly for businesses looking to adopt 5G services. The lack of universal standards and the existence of multiple variations of 5G create difficulties in ensuring compatibility across networks and devices. This complexity can hinder the widespread adoption of 5G services, as organizations face the dilemma of choosing the right equipment and solutions while navigating a fragmented standards landscape.

Investment Costs and Infrastructure Development

A significant challenge in the Global 5G Services Market is the substantial investment required for infrastructure development. The rollout of 5G networks demands substantial capital expenditure, including the deployment of new base stations, antennas, and fiber optic networks. Building the necessary infrastructure to support 5G coverage across urban and rural areas is a resource-intensive endeavor for telecommunication companies. Additionally, businesses seeking to harness 5G for their operations may face high upfront costs for equipment and services. These investment challenges can slow down the pace of 5G adoption, particularly for smaller enterprises and regions with limited financial resources.

Spectrum Allocation and Regulatory Hurdles

The allocation of spectrum and regulatory hurdles present significant challenges for the Global 5G Services Market. Spectrum allocation is a critical aspect of 5G deployment, as it determines the available bandwidth for networks. Regulatory bodies in different countries manage spectrum allocation, and the process can be complex and time-consuming. Furthermore, regulatory compliance regarding issues like spectrum licensing, security, and privacy can vary widely between regions. Navigating these regulatory intricacies and ensuring compliance can be a daunting task for

telecommunication providers and businesses seeking to offer or utilize 5G services. Delays and uncertainties in spectrum allocation and regulatory approvals can impede the timely rollout and adoption of 5G services.

Security and Privacy Concerns

Security and privacy concerns are paramount challenges in the Global 5G Services Market. With the increased volume of data transmitted over 5G networks, there is a heightened risk of cyberattacks and data breaches. Ensuring the security of 5G networks and the data they carry is a top priority. Additionally, privacy concerns related to the collection and utilization of user data in 5G services must be addressed comprehensively. Striking the right balance between security, privacy, and usability is a complex challenge, and businesses and service providers must invest in robust security measures and privacy safeguards to build trust among users and regulatory authorities.

Environmental Impact and Sustainability

The environmental impact and sustainability of 5G networks pose challenges in the Global 5G Services Market. The expansion of 5G infrastructure, including the deployment of additional base stations and data centers, consumes substantial energy resources. As the world increasingly focuses on sustainability and reducing carbon emissions, the energy efficiency of 5G networks becomes a critical concern. Telecommunication companies and businesses utilizing 5G services need to address these environmental challenges by implementing energy-efficient technologies and sustainable practices to minimize the carbon footprint of 5G networks.

Key Market Trends

Rapid Growth in 5G Network Deployments

The global 5G services market is experiencing rapid growth as telecommunication companies worldwide deploy 5G networks. 5G technology offers significantly faster data speeds, lower latency, and higher network capacity compared to previous generations of wireless networks. This enables a wide range of applications and services, including ultra-high-definition video streaming, virtual reality, augmented reality, and Internet of Things (IoT) devices. The demand for 5G services is driven by the increasing need for faster and more reliable connectivity, especially in sectors such as healthcare, manufacturing, transportation, and entertainment. As more countries and regions roll out 5G networks, the global 5G services market is expected to witness substantial

growth in the coming years.

Emergence of Industry-Specific 5G Solutions

The emergence of industry-specific 5G solutions is a significant trend in the global 5G services market. As 5G technology enables ultra-low latency and high reliability, it opens up new possibilities for industry-specific applications and services. Various sectors, including automotive, healthcare, manufacturing, and smart cities, are exploring the potential of 5G to transform their operations and deliver innovative solutions. For example, in the automotive industry, 5G connectivity can enable vehicle-to-vehicle communication, real-time traffic updates, and autonomous driving capabilities. In healthcare, 5G networks can support remote surgeries, telemedicine, and real-time patient monitoring. The development of industry-specific 5G solutions is expected to drive the adoption of 5G services across different sectors, creating new revenue streams for service providers.

Increasing Demand for Edge Computing in 5G Networks

The demand for edge computing in 5G networks is on the rise in the global 5G services market. Edge computing involves processing and analyzing data closer to the source, at the edge of the network, rather than sending it to centralized cloud servers. This approach reduces latency and enables real-time data processing, making it ideal for applications that require immediate response times, such as autonomous vehicles, smart cities, and industrial automation. With the high data speeds and low latency of 5G networks, edge computing becomes even more crucial in delivering efficient and responsive services. Service providers are investing in edge computing infrastructure and partnerships to support the growing demand for edge-enabled 5G services, driving the expansion of the global 5G services market.

Focus on Network Slicing for Customized Services

Network slicing is gaining prominence in the global 5G services market as a means to provide customized services to different user groups. Network slicing allows service providers to divide a single physical network into multiple virtual networks, each tailored to specific requirements, such as bandwidth, latency, and security. This enables service providers to offer differentiated services to various industries and user segments. For instance, a network slice can be dedicated to autonomous vehicles, ensuring low latency and high reliability, while another slice can be optimized for IoT devices, prioritizing network capacity. Network slicing enables service providers to monetize the

flexibility and versatility of 5G networks, catering to the diverse needs of different industries and driving the growth of the global 5G services market.

Security and Privacy Concerns in 5G Networks

As 5G networks become more prevalent, there is an increasing focus on security and privacy in the global 5G services market. The higher data speeds and increased connectivity of 5G networks create new challenges in ensuring the security and privacy of user data. Service providers and technology vendors are investing in robust security measures, such as encryption, authentication, and network monitoring, to protect against cyber threats and unauthorized access. Additionally, privacy regulations and consumer expectations are driving the adoption of privacy-enhancing technologies, such as secure data sharing frameworks and user consent mechanisms. By addressing security and privacy concerns, service providers aim to build trust with users and foster the widespread adoption of 5G services, further propelling the growth of the global 5G services market.

Segmental Insights

Communication Type Insights

The enhanced Mobile Broadband (eMBB) segment dominated the market with a share of more than 40% in 2022 and is expected to grow considerably over the forecast period. The high share is attributed to the preliminary focus by 5G network operators on delivering enhanced broadband capabilities for applications, such as high-speed cloud-based gaming, AR/VR, UHD video, and uninterrupted video calls. The initial phase of the rollout is expected to focus on a 5G wireless non-standalone deployment model. eMBB provides extremely high data speeds for residential and commercial use.

Thus, eMBB is expected to cater to several use cases, such as in-vehicle infotainment, 4K video access, and virtual meeting, thereby driving the segment growth. The massive Machine-Type Communications (mMTC) segment is expected to witness the fastest CAGR from 2023 to 2030. Massive machine-type communications envisage catering to the growing need for a developed digital ecosystem. mMTC focuses on providing services for high connection density applications, such as smart buildings and smart cities. The growing need to ensure uninterrupted connectivity for all the IoT devices deployed in a network is anticipated to contribute to the growth of the mMTC segment over the forecast period.

Vertical Insights

The enterprise segment led the market in 2021 and held the largest revenue share of 94.0%. The segment is expected to continue its dominance over the forecast period due to the significant investments by key players in the latest technologies for communication. The growing demand for higher data speeds for residential and commercial applications is estimated to drive the growth of the IT & telecom segment over the forecast period. 5G services are expected to deliver ubiquitous broadband access between homes and offices, which would encourage remote consultation with specialists and reduce business travel. The growing need for enhanced broadband capacity for virtual business meetings is anticipated to propel the segment growth during the forecast period. The manufacturing sector has been digitalizing rapidly. As such, production lines are being automated continuously to enhance overall productivity. This has triggered the need for seamless wireless communication between the robots, sensors, actuators, and other devices installed in manufacturing facilities. Thus, the manufacturing segment is expected to exhibit the fastest CAGR over the forecast period. Moreover, key verticals, such as healthcare, are expected to see a considerable adoption of the services to provide enhanced telemedicine and healthcare emergency services during and post-pandemic.

The consumer segment is expected to grow at the highest CAGR of 71.4% during 2023–2030. This growth is attributed to the increasing commercialization of the 5G services for consumer applications across various countries, including the U.S., China, Japan, Germany, and South Korea. The number of 5G subscribers is increasing at a faster rate since 5G provides lower latency, higher speed, and greater capacity as compared to the 4G LTE networks.

Regional Insights

Asia Pacific led the market in 2022 with a share of over 40% and is estimated to expand further at the fastest CAGR during the forecast period. Key market players in APAC, such as China Telecom, China Mobile, SK Telecom, and KT Corp., are investing aggressively in rolling out the 5G network infrastructure in China, Japan, and South Korea. Most of these investments are for the deployment of the next-generation infrastructure for the media & entertainment, transportation & logistics, healthcare, and manufacturing industry verticals. These investments are estimated to propel the growth of the Asia Pacific regional market over the forecast period. Moreover, the high demand for smartphones supporting higher data speeds has resulted in the robust production of 5G-enabled smartphones across the region. 5G services are expected to gain traction

as key smartphone manufacturers in the region, such as Huawei Technologies Co. Ltd., Samsung Electronics Co., Ltd., and BBK Electronics Corp., continue to launch 5G-enabled smartphones in response to the rising demand. North America was the second-largest regional market in 2022. Some of the most significant investments in deploying the 5G network infrastructure are materializing in the U.S. For instance, according to GVR analysis, mobile operators based in the U.S. invested around USD 250 billion in mobile network infrastructure rollout between 2010 and 2017. The aggressive investments in the country in building smart homes, establishing smart industries, and rolling out smart city projects are expected to contribute to the growth of the regional market over the forecast period.

Key Market Players

AT&T, Inc.

BT Group plc

China Mobile Ltd.

China Telecom Corporation Ltd.

Bharti Airtel Ltd.

NTT Docomo

KT Corp.

Saudi Telecom Company

Vodafone Group

Deutsche Telekom AG

SK Telecom Co., Ltd.

Verizon Communications, Inc.

T-Mobile USA, Inc.

Report Scope:

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

5G Services Market, By Vertical:

Manufacturing

IT & Telecom

BFSI

Others

5G Services Market, By Communication Type:

FWA

eMBB

uRLLC

mMTC

5G Services Market, By End User:

Smart Cities

Connected Workers

Connected Vehicles

Connected Factories

Smart Buildings

Smart Utilities

Connected Healthcare

Others

5G Services 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 Services Market.

Available Customizations:

Global 5G Services 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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13. MARKET DYNAMICS

- 13.1. Drivers
- 13.2. Challenges

14. MARKET TRENDS AND DEVELOPMENTS

15. COMPANY PROFILES

- 15.1. AT&T, Inc.
 - 15.1.1. Business Overview
 - 15.1.2. Key Revenue and Financials
 - 15.1.3. Recent Developments
 - 15.1.4. Key Personnel/Key Contact Person
 - 15.1.5. Key Product/Services Offered
- 15.2. BT Group plc
 - 15.2.1. Business Overview
 - 15.2.2. Key Revenue and Financials
 - 15.2.3. Recent Developments
 - 15.2.4. Key Personnel/Key Contact Person
 - 15.2.5. Key Product/Services Offered
- 15.3. China Mobile Ltd.
 - 15.3.1. Business Overview
 - 15.3.2. Key Revenue and Financials
 - 15.3.3. Recent Developments
 - 15.3.4. Key Personnel/Key Contact Person
 - 15.3.5. Key Product/Services Offered
- 15.4. China Telecom Corporation Ltd.
 - 15.4.1. Business Overview

- 15.4.2. Key Revenue and Financials
- 15.4.3. Recent Developments
- 15.4.4. Key Personnel/Key Contact Person
- 15.4.5. Key Product/Services Offered
- 15.5. Bharti Airtel Ltd.
 - 15.5.1. Business Overview
 - 15.5.2. Key Revenue and Financials
 - 15.5.3. Recent Developments
 - 15.5.4. Key Personnel/Key Contact Person
 - 15.5.5. Key Product/Services Offered
- 15.6. NTT Docomo
 - 15.6.1. Business Overview
 - 15.6.2. Key Revenue and Financials
 - 15.6.3. Recent Developments
 - 15.6.4. Key Personnel/Key Contact Person
 - 15.6.5. Key Product/Services Offered
- 15.7. KT Corp.
 - 15.7.1. Business Overview
 - 15.7.2. Key Revenue and Financials
 - 15.7.3. Recent Developments
 - 15.7.4. Key Personnel/Key Contact Person
 - 15.7.5. Key Product/Services Offered
- 15.8. Saudi Telecom Company
 - 15.8.1. Business Overview
 - 15.8.2. Key Revenue and Financials
 - 15.8.3. Recent Developments
 - 15.8.4. Key Personnel/Key Contact Person
 - 15.8.5. Key Product/Services Offered
- 15.9. Vodafone Group
 - 15.9.1. Business Overview
 - 15.9.2. Key Revenue and Financials
 - 15.9.3. Recent Developments
 - 15.9.4. Key Personnel/Key Contact Person
 - 15.9.5. Key Product/Services Offered
- 15.10. Deutsche Telekom AG
 - 15.10.1. Business Overview
 - 15.10.2. Key Revenue and Financials
 - 15.10.3. Recent Developments
 - 15.10.4. Key Personnel/Key Contact Person

- 15.10.5. Key Product/Services Offered
- 15.11. SK Telecom Co., Ltd.
 - 15.11.1. Business Overview
 - 15.11.2. Key Revenue and Financials
 - 15.11.3. Recent Developments
 - 15.11.4. Key Personnel/Key Contact Person
 - 15.11.5. Key Product/Services Offered
- 15.12. Verizon Communications, Inc.
 - 15.12.1. Business Overview
 - 15.12.2. Key Revenue and Financials
 - 15.12.3. Recent Developments
 - 15.12.4. Key Personnel/Key Contact Person
 - 15.12.5. Key Product/Services Offered
- 15.13. T-Mobile USA, Inc.
 - 15.13.1. Business Overview
 - 15.13.2. Key Revenue and Financials
 - 15.13.3. Recent Developments
 - 15.13.4. Key Personnel/Key Contact Person
 - 15.13.5. Key Product/Services Offered

16. STRATEGIC RECOMMENDATIONS

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