

Telecom Equipment Market - Global Industry Size, Share, Trends, Competition, Opportunity and Forecast, Segmented By Infrastructure (Wireless, Wired Infrastructure), By Product Type (Public Switching Equipment, Transmission Equipment, Customer Premises Equipment), By Offering (Products, Software, Services), By End User (IT & Telecommunication, Consumer Electronics, BFSI, Retail, Media, Defense, and Others), By Region & Competition, 2021-2031F

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Abstracts

The global telecom equipment market is projected to grow from USD 385.49 billion in 2025 to USD 811.56 billion by 2031, at a 13.21% CAGR. This market includes the hardware and software infrastructure—such as transmission systems, radio access nodes, and switching centers—vital for telecommunication networks. Its expansion is primarily fueled by the rapid worldwide deployment of 5G networks and the growing demand for robust fixed wireless access to ensure ubiquitous connectivity. With mobile operators forecast to invest USD 180 billion in capital expenditure in 2025, according to GSMA, there's a clear focus on upgrading network capacity to manage increasing data traffic and support digital transformation. The market also gains momentum from the shift to Standalone 5G architectures, which enable advanced industrial use cases and enterprise modernization. Nevertheless, a major hurdle to wider market expansion is the substantial capital investment needed for infrastructure deployment in developing regions, which creates an uneven playing field for network upgrades and restricts the potential customer base for equipment vendors in these emerging economies,

challenging uniform global growth.

Market Driver

The primary driver for market growth is the rapid global deployment of 5G network infrastructure, which requires significant hardware upgrades across radio access nodes and transmission systems. Telecom operators are actively deploying Massive MIMO antennas and enhancing base stations to facilitate ultra-low latency and improved mobile broadband, representing a fundamental architectural shift to Standalone 5G that boosts demand for new core network equipment and increased cell site density. The advanced adoption of 5G in developed markets, with 60% of mobile connections in the US and Canada being 5G by October 2025 (GSMA), exemplifies the extensive equipment overhaul needed. Concurrently, the modernization of legacy infrastructure to support next-generation connectivity compels vendors to innovate and operators to adopt software-centric solutions, necessitating substantial R&D investment to integrate AI and cloud-native capabilities into telecom gear. Huawei, for example, invested CNY 179.7 billion in R&D in 2024 to address evolving network needs. This technological focus is reinforced by the sector's substantial economic contribution, generating approximately 5.8% of global GDP or \$6.5 trillion in economic value in 2025 (GSMA), which further incentivizes continuous infrastructure spending.

Market Challenge

A significant bottleneck for the Global Telecom Equipment Market is the considerable capital required for infrastructure deployment in economically developing regions. Next-generation telecommunication infrastructure, specifically for 5G and fiber networks, is capital-intensive, demanding massive upfront investment in hardware like radio access nodes and transmission systems. In emerging economies, financial constraints and limited access to affordable funding hinder operators from matching the technological advancements seen in wealthier nations, thereby restricting the total addressable market for equipment vendors. This inability of high-growth regions to acquire necessary infrastructure at scale leads to stagnated global sales. The International Telecommunication Union (ITU) estimated in 2025 that the investment gap to close the digital infrastructure deficit would be at least \$1.6 trillion, predominantly in developing countries. This substantial funding deficit directly impedes these markets' ability to modernize their networks, consequently limiting revenue opportunities for global equipment manufacturers and perpetuating a fragmented market where advanced connectivity remains concentrated in affluent regions.

Market Trends

A critical market trend is the expansion of private 5G networks for industrial enterprise applications, which shifts revenue opportunities from consumer subscriptions to customized business solutions. These dedicated infrastructures provide enterprises with superior security, ultra-low latency, and guaranteed bandwidth, crucial for automated manufacturing and port logistics, as industries increasingly seek to control their connectivity independently of public network congestion. This trend demands specialized small cell and core network equipment, evidenced by the Global mobile Suppliers Association (GSA) reporting 1,846 organizations worldwide had deployed private mobile networks by Q2 2025. Concurrently, the deployment of energy-efficient and sustainable telecom infrastructure has become a decisive procurement factor, driven by operators' rising energy costs and strict carbon reduction targets. Vendors are re-engineering radio access gear to minimize power consumption through deep sleep modes and AI-driven traffic management, prioritizing operational efficiency. This focus on green networks stimulates the replacement of legacy equipment lacking these power-saving capabilities, directly influencing hardware design and selection; for example, Nokia's latest AirScale 5G massive MIMO base stations used up to 50% less energy than their 2019 baseline by September 2025, prompting operators to modernize for both capacity and reduced long-term operational expenditures.

Key Market Players

Huawei Technologies Co., Ltd.

Nokia Corporation

Cisco Systems, Inc.

Ericsson

ZTE Corporation

Samsung Electronics Co., Ltd.

Ciena Corporation

Juniper Networks, Inc.

NEC Corporation

CommScope Holding Company, Inc.

Report Scope

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

Telecom Equipment Market, By Infrastructure

Wireless

Wired Infrastructure

Telecom Equipment Market, By Product Type

Public Switching Equipment

Transmission Equipment

Customer Premises Equipment

Telecom Equipment Market, By Offering

Products

Software

Services

Telecom Equipment Market, By End User

IT & Telecommunication

Consumer Electronics

BFSI

Retail

Media

Defense

Others

Telecom 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 Telecom Equipment Market.

Available Customizations:

Global Telecom 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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