

# **Europe 5G Base Station Market Forecast to 2030 - Regional Analysis - by Component (Hardware and Service), Frequency Band (Less Than 2.5 GHz, 2.5 - 8 GHz, 8 - 25 GHz, and More Than 25 GHz), Cell Type [Macrocell and Small Cell (Microcell, Picocell, and Femtocell)], and End User (Industrial, Commercial, and Residential)**

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## **Abstracts**

The Europe 5G base station market was valued at US\$ 5,854.74 million in 2022 and is expected to reach US\$ 18,890.44 million by 2030; it is estimated to register a CAGR of 15.8% from 2022 to 2030.

### **Surge in IoT and Industry 4.0 Adoption Drives Europe 5G Base Station Market**

Industry 4.0 is considered a new phase of the industrial revolution, which highly emphasizes telecommunication, interconnectivity, real-time data, and machine learning. Industry 4.0 use of mobile networks is a growing topic of interest to manufacturers and supply chain companies; as enterprises drive to increase Industry 4.0 adaptability in their operations, they achieve significant benefits while using 5G mobile technologies. Wi-Fi networks are a key part of any enterprise IT network, particularly for flexible workspaces that use laptops, tablets, and smartphones. However, there are a number of technical and scalability challenges that limit the usefulness of Wi-Fi networks for wider manufacturing and supply chain operational applications, particularly when device numbers are scaled up. Therefore, manufacturing and supply chain companies are encouraged to introduce 5G mobile connectivity for their adaptable production environments. Mobile networks deliver the breadth of capabilities to support rapid reconfiguration of the production line, automated guided vehicles or autonomous mobile

robots, reliable continuous tracking of components or supplies, or any of the other use cases analyzed earlier. As a result, the enterprise is able to achieve the complete benefits of Industry 4.0 investments.

The substantial capabilities introduced with 5G, including network slicing, new authentication framework, key exchange and encryption, edge computing, massive bandwidth, and open networking initiatives-provide ultra-reliable low-latency and deliver the greatest flexibility for Industry 4.0. In addition, 5G developments such as time-sensitive networking support can deliver additional capabilities to support the migration of wired networks to wireless.

Furthermore, Industry 4.0 heavily depends on big data to support advanced analytics, automated systems, and asset tracking. IoT sensors offer the physical medium to transmit and collect that data to edge devices for processing. IoT sensors collect massive data points, which are then analyzed and consumed by artificial intelligence and machine learning platforms. Sensors can communicate across an array of wireless mediums, such as Bluetooth, Wi-Fi, LTE/5G, and LoRa. Industry 4.0 is being powered by mobile networks starting with carrier-grade 4G in the form of private wireless networks and migrating to 5G as business needs emerge. Hence, the surge in IoT and Industry 4.0 adoption fuels the 5G base station market growth.

## Europe 5G Base Station Market Overview

Governments of various countries in Europe have recognized the strategic importance of 5G technology and have launched initiatives to promote its deployment. These initiatives often involve investments in infrastructure and spectrum allocation. The European Commission identified 5G opportunities in 2013, establishing a public-private partnership on 5G (5G-PPP) to accelerate research and innovation in 5G technology. The European Commission committed public funding of more than US\$ 798.02 million through the Horizon Programme 2020 to support this activity. These activities were accompanied by an international plan to ensure global agreement building on 5G. EU investment in 5G in 2013 and research is vital to support the traffic volume expected by 2025. EU investment also boosted networks and Internet architectures in emerging areas such as the IoT and machine-to-machine (M2M) communication. Similarly, in 2021, in the setup of targeted fund-of-funds envelopes such as the artificial intelligence (AI) and Blockchain pilot program implemented by the European Investment Fund, which deployed US\$ 114 million to catalyze an overall investment of more than US\$ 798.02 million in eligible companies. Furthermore, telecom operators in Europe compete to deploy 5G networks to attract subscribers and remain competitive in the

market. For instance, in August 2023, PPF Group agreed to sell a controlling stake in its telecom's units in Bulgaria, Hungary, Serbia, and Slovakia for an initial amount of US\$ 2,313.33 million. Also, the rise in market competition between key players is driving the expansion of 5G infrastructure. Therefore, the demand for 5G base stations is also increasing in Europe, which boosts market growth.

## Europe 5G Base Station Market Revenue and Forecast to 2030 (US\$ Million)

### Europe 5G Base Station Market Segmentation

The Europe 5G base station market is categorized into component, frequency band, cell type, end user, and country.

Based on component, the Europe 5G base station market is bifurcated into hardware and service. The hardware segment held a larger market share in 2022.

In terms of frequency band, the Europe 5G base station market is segmented into less than 2.5 GHz, 2.5 - 8 GHz, 8 - 25 GHz, and more than 25 GHz. The 2.5 - 8 GHz segment held the largest market share in 2022.

By cell type, the Europe 5G base station market is bifurcated into macrocell and small cell. The small cell segment held a larger market share in 2022. Furthermore, the small cell segment is subsegmented into microcell, picocell, and femtocell.

Based on end user, the Europe 5G base station market is segmented into industrial, commercial, and residential. The commercial segment held the largest market share in 2022.

By country, the Europe 5G base station market is segmented into Germany, France, Italy, the UK, Russia, and the Rest of Europe. Germany dominated the Europe 5G base station market share in 2022.

Airspan Networks Holdings Inc, CommScope Holding Co Inc, Huawei Technologies Co Ltd, NEC Corp, Nokia Corp, Samsung Electronics Co Ltd, Telefonaktiebolaget LM Ericsson, and ZTE Corp are among the leading companies operating in the Europe 5G base station market.

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