

North America 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 North America 5G base station market was valued at US\$ 4,501.44 million in 2022 and is expected to reach US\$ 13,246.30 million by 2030; it is estimated to register a CAGR of 14.4% from 2022 to 2030.

Increased Demand for Low Latency and High-Speed Data Fuels North America 5G Base Station Market

Low latency 5G networks create new possibilities for services that demand nearly instant response time. These services include telemedicine, augmented reality headsets, and communications between autonomous vehicles that support linking into efficient platoons. Less latency means reducing the time between sending and receiving the signal. 5G network brings the network range to at least under ten milliseconds and, in best cases, approximately one millisecond delay, meaning data will be transferred in real-time. The advancement of 5G-based mobile networks achieves low delays, which opens the way to completely new opportunities, including virtual reality experiences, multiplayer mobile gaming, factory robots, and self-driving car applications for which a speedy response is considered a strong criterion. Focusing on self-driving vehicles, existing cellular networks already offer a wide variety of tools that address business requirements. C-V2X and its evolution to 5G V2X will foster synergies between the

automotive industry and other verticals moving towards 5G. Its extreme throughput, low latency, and enhanced reliability will allow vehicles to share rich, real-time data, supporting autonomous and connected driving experiences. For example, LTE Cat-M and Narrow Internet of Things (NB-IoT) are excellent low-power sensor communication technologies. In order to determine and recommend individual actions to enable complex vehicle maneuvering, e.g., deceleration, lane changes, or route modifications, acceleration, the vehicles must be able to receive and share information about their driving intentions in real time. This low-latency demand can be fulfilled with the development of an overall 5G system architecture to provide optimized end-to-end vehicle-to-everything (V2X) connectivity. With the increasing use of cloud-based services, big data analytics, and the Internet of Things (IoT), there is an increased demand for high-speed data transmission and low latency. The need for real-time interactions and the increasing use of data-intensive applications across various sectors drive the growing demand for low-latency and high-speed data. 5G base stations are essential in meeting these demands by providing the necessary infrastructure for high-speed, low-latency, and reliable connectivity, making them a crucial component of the evolving telecommunications landscape. Thus, increased demand for low latency and high-speed data drives the 5G base station market.

North America 5G Base Station Market Overview

North American consumers are increasingly adopting 5G-enabled devices, such as smartphones, tablets, and IoT gadgets. As a result, there is a growing need for 5G infrastructure to support these devices with high-speed data and low latency. Telecom operators in North America are engaged in fierce competition to provide the best 5G services. This competition drives the deployment of more 5G base stations to offer better coverage and faster speeds. For instance, in October 2023, Ericsson launched a new software toolkit to strengthen the capabilities of the 5G standalone network and enable premium services with differentiated connectivity. The toolkit aims to help communications service providers (CSPs) deliver high throughput, high reliability, and low latency performance levels for use cases. These use cases include lag-free mobile cloud gaming, video conferencing, live broadcasting, remote-controlled machines/vehicles, public safety services, and future XR. Also, in August 2023, Eastlink partnered with Nokia to enhance its 5G network across Canada. Under this partnership, Eastlink is modernizing its mobile network by using Nokia's AirScale portfolio, including 5G Radio Access Network (RAN) technology, to deliver fast speeds, unparalleled performance, and expanded network capacity.

Similarly, in December 2022, AT&T expanded its 5G network infrastructure to reach 25

cities across Mexico. AT&T Mexico is offering its 5G services in 18 cities across the country. The operator's 5G services are active in Mexico City, Guadalajara, Monterrey, Tijuana, Mexicali, Ciudad Ju?rez, Mazatlan, Ciudad Obregon, Navojoa, Guasave, Ensenada, Puerto Penasco Guamuchil, Culiacan, Saltillo, Torreon, and Morelia. As the demand for 5G base stations continues to grow, telecom operators, infrastructure providers, and technology companies are investing in expanding and upgrading the 5G infrastructure in North America to meet the requirements of consumers, businesses, and various industries. Therefore, the above instances show that the 5G base station market is growing significantly.

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

North America 5G Base Station Market Segmentation

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

Based on component, the North America 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 North America 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 North America 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 sub segmented into microcell, picocell, and femtocell.

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

By country, the North America 5G base station market is segmented into the US, Canada, and Mexico. The US dominated the North America 5G base station market share in 2022.

Airspan Networks Holdings Inc, Baicells Technologies North America 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 North America 5G base station market.

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