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Small Cells: Market Shares, Strategies, and Forecasts, Worldwide, 2019 to 2025

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Abstracts

LEXINGTON, Massachusetts (June 2, 2019) – WinterGreen Research announces that it has published a new study Small Cells: Market Shares, Strategy, and Forecasts, Worldwide, 2019 to 2025. The 2019 study has 248 pages, 135 tables and figures. The leading vendors in the small cell market have invested in high-quality technology and processes to develop leading edge monitoring and digital triggering activation capability.

Small Cell markets encompass virtualization, cloud, edge, and functional splits. As 5G networks come on line in 2020, they require increasing sophistication from mobile operators. The challenge going forward in mobile network buildout is to bring together a growing number of LTE and 5G radio access technologies. A range of connectivity services are needed. APIs are needed in each small cell to manage connectivity to a number of customer sensors that are implemented in different segments.

The small cell sales at $11.5 billion in 2018 are forecast to reach $52 billion in 2025. Networks spending has been transformed from macro cell tower dominance to 80% of spending on small cells. Small cells support wireless communications across short distances. All the indoor and outdoor places need to increase wireless coverage, providing significant market growth for small cells.

Small Cell markets encompass virtualization, cloud, edge, and functional splits. 5G requires increasing sophistication from mobile operators. The challenge is to bring together a growing number of LTE and 5G radio access technologies. A range of connectivity services are needed. Associated APIs are needed in each small cell to manage connectivity to a number of customer segments.

Figure 1. Small Cell Market Driving Forces

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Need for enabling evolution of local communications network

Availability of fully virtualized, distributed, ultra-reliable software

Effective software for controlling agile infrastructure

Automation facilitates large-scale low-cost network densification

Lowers cost by implementing network through third-party deployments

Effective integration of base small cell technologies

Systems integration achieved with open and interoperable standards

Open and interoperable standards needed to ensure competition

open and interoperable standards needed to ensure economies of scale

Adoption of these 5G Era technologies will require culture shifts in processes

Small cells need infrastructure across a broad range of commercial and governmental organizations. Each have a part to play in making small cells work along with tower infrastructure to create a broadband commercial network. Service providers are focused on densification. Small cells are a critical part of the infrastructure for several key 5G Era deployment scenarios:

Figure 2. Small Cell Infrastructure Critical Issues

Service providers are focused on densification

Small cells are a critical part of the infrastructure for key 5G implementations

5G deployment needs small cells

>6GHz spectrum propagation limits cell sizes

Shared and license-exempt spectrum mandates lower power

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Areas of hyper-dense broadband traffic need small cells

Small cells meet demand in cities, stadia, transport hubs

Scalable deployment

Low-cost deployment

Using a low-skilled, third-party, or end-user workforce

Small/medium enterprises requiring self-deployed indoor coverage

Coverage extension in rural, remote, moving and temporary deployment

Scenarios with equipment size, weight or power constraints.

The digital economy, self-driving cars, drones, traffic lights, and smart things all need more wireless coverage. According to Susan Eustis, leader of the team that prepared the research, “Small cell suppliers have a focus on broadband improvement. Power and performance are being improved. Small cells improve the transmission coverage and density.”

This 5G coverage is needed as IoT, the Internet of things and smart phone video increase transmission needs. “Everything will be connected,” said SoftBank Chief Executive Masayoshi Son, announcing an ARM processor deal in London.

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