

## **3Q22 WIRELESS INFRASTRUCTURE - DECEMBER 2022**

Quarterly Update - 2G/3G/4G/5G Radio Access & Core Networks





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3Q22 IS DOWN 8% YOY AND DOWN 1% QOQ, THE GLOBAL MARKET CONTINUES TO OPERATE A'EQUILIBRIUM REACHED IN 3Q21	Γ ITS 5
5Geopolitics has set a wireless market equilibrium between the west and the east	
But the West's GDP remains significantly higher than the East's	
Now with Russia at war with Ukraine, India is the caveat	
As mentioned in the previous 5G core section, a faster migration to SA is greatly desired	
The potential for LTE-A and VoLTE upgrades remains phenomenal	
The need for IMS has never been greater	
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Huawei comes back to the #1 position for both total infrastructure and RAN market shares; Nokia's	
ASCENSION CONTINUES	
Due to the equilibrium, it remains musical chairs between the Chinese and the European duos	
The swap is real and here to stay, until 6G kicks in?In core networks, the bulk of 5G core sales again came from China in 3Q22: Huawei and ZTE are neck A	
NECK AND COMBINED COMMAND A 58% MARKET SHARE	
In 4G core, Huawei maintained its lead, followed by Ericsson	
Gaining or keeping market share in the EPC/vEPC market is a tough balancing act	
AS RIGHTLY ANTICIPATED, 2021 WAS A RETURN TO NORMALCY THAT SIGNALS A PEAK IN 2022	
OUR FORECAST FOR 2022 IS \$331M LOWER, THE REST REMAINS SIMILAR	17
After revision, we expect the wireless infrastructure market to hit \$46.6B by yearend, instead of \$47B	
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Ironically, geopolitics fueled both the open RAN ecosystem and traditional 5G RAN rollouts led by Eri Nokia, and Samsung	
Home to the world's largest wireless network footprints, Asia Pacific will remain the largest marke	
NORTH AMERICA WILL REMAIN THE WORLD'S SECOND LARGEST WIRELESS INFRASTRUCTURE MARKET AFTER ASIA PAGE	
EMEA WILL REMAIN FLAT THROUGH 2024	
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## **Abstract**

This report analyzes the 3Q22 wireless infrastructure market worldwide and covers 2G, 3G, 4G and 5G radio access network (RAN) and core network nodes. It presents historical data from 2016 to 2021, quarterly market size and vendor market shares, and a detailed market forecast through 2027 for 2G/3G/4G/5G RAN, including Open vRAN, and core networks (EPC, vEPC, and 5GC), for each region (North America, Europe Middle East Africa, Asia Pacific, Caribbean Latin America). The historical data accounts for the sales of more than 30 wireless infrastructure vendors, including a few vendors that shared confidential sales data with LightCounting. The market forecast is based on a model correlating wireless infrastructure vendor sales with 20 years of service provider network rollout pattern analysis, and upgrade and expansion plans.