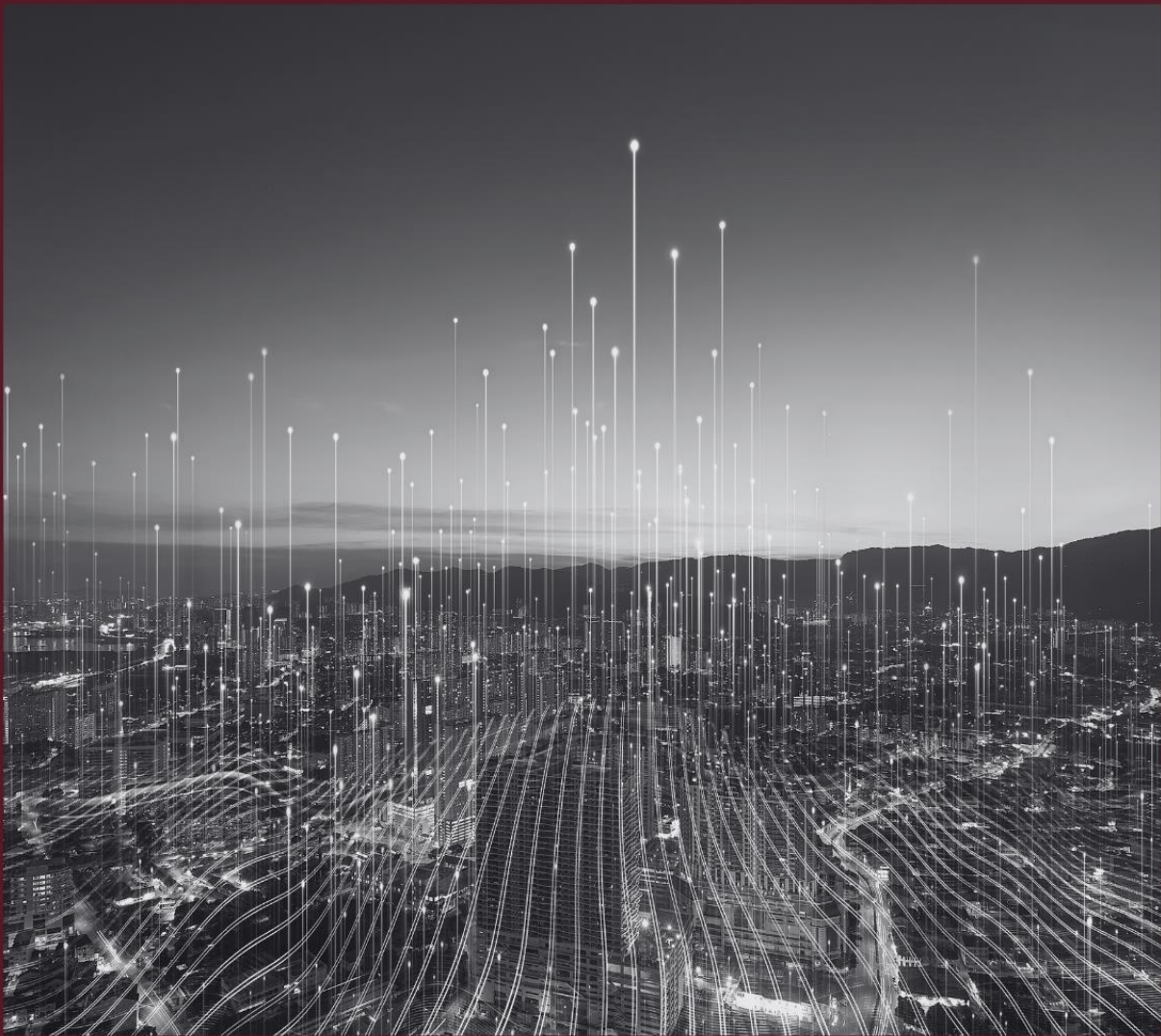


Industrial Private Cellular 2023



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Abstract

This report provides a global view of the Private LTE and 5G market across different industrial sectors and geography. The report highlights different industry trends and spectrum policies driving LTE and 5G adoption across major industry sectors. Also provided is a five-year forecast of the network infrastructure, cellular devices, and network and application services that make up the growing market opportunity. The report also provides the market forecast by three different business models that we have identified.

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METHODOLOGY

To create estimates and forecasts for the Industrial Private Cellular market, Mobile Experts relies on direct input from more than 25 industry sources, with different mobile operators, managed service providers, system integrators, industrial automation companies, mobile infrastructure and traditional IT vendors, and software solutions providers that contribute to the overall analysis to give a detailed global view of the market. Mobile Experts has also spoken with more than 20 other companies in related business areas for cellular IoT business areas.

Mobile Experts built a “top-down” forecast based on direct input from mobile operators, vendors, and system integrators. Then, Mobile Experts built a “bottom-up” forecast through discussions with OEMs, automation companies, software developers, and module suppliers in the supply chain. Financial disclosures, investor presentations, and earnings transcripts were used to provide a high-level view of the various industry sectors and to understand the existing private wireless market.

To determine the end device market for Private LTE, we relied on our own *Cellular IoT 2021* report. Note that while developing our Cellular IoT forecasts, we interviewed at least 15 enterprises in each vertical market, resulting in a strong understanding of business models and growth drivers in these vertical markets:

- Automotive IoT
- Asset Tracking
- Industrial IoT (including manufacturing, transportation, oil and gas, and mining)
- Healthcare and fitness devices
- Building Automation
- Smart Meters/utilities
- URLLC Devices

Mobile Experts separates the Private Cellular market into three pieces:

- 1) Industrial Private Cellular Equipment (this report);
- 2) Enterprise Private Cellular Equipment (a second companion report, on ‘carpeted’ or ‘light’ enterprises); and
- 3) Managed Private Cellular Services (coming soon).

Following this framework, Mobile Experts covers the equipment revenue for CPEs, UE and IoT devices, RAN equipment, Core Networks, and other equipment in this report. The ‘services’ element of revenue shown in this report refers to the revenue associated with installation and set-up of a network, not the “Managed Services” associated with a full-service “Private Wireless as a Service” business model.