Asia Pacific Small Cell Tower Market - Growth, Trends, Covid-19 Impact, and Forecasts (2023 - 2028)

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Report description:

The Asia-Pacific Small Cell Tower Market is estimated to grow at a CAGR of 24.1% from 2022 to 2027. Small cell towers are a cost-effective way to fix coverage gaps, increase capacity, and prepare networks for 5G without building larger, more expensive macro sites.

? The demand for modern telecommunication networks is increasing as the amount of mobile data traffic in the region increases. Over the projected period, emerging network development demands will likely increase the market for small cell towers. Gaming traffic is anticipated to increase ninefold between 2017 and 2022, which will account for 4% of all IP traffic. Virtual and augmented reality traffic will also increase, reaching 4.02 exabytes per month by 2022, up from 0.33 exabytes per month in 2017.

? Small cells are necessary for today's environment for applications that require more bandwidth and the growing number of connected devices and IoT applications. In addition, 5G telecom companies are focusing on installing tiny cell towers in the low-frequency spectrum to provide customers with increased bandwidth offerings.

? During the forecast period, government restrictions for implementing 5G networks in the area are projected to boost the small cell towers market. For example, the Indian Telecom Department intends to make accessible the standardized and contiguous spectrum needed for 5G implementation.

? Furthermore, the Open RAN alliance is boosting the industry in the region since it has established a protocol to split 7.2 (between the upper and lower PHY), resulting in cheap RU costs. However, RU requires lower latency and larger bandwidth for the connection, and as a result, the alliance is gaining popularity in the region for installations since buildings have more fiber to exploit for the front haul between the RU and DU.

? The need for tiny cell towers is also increasing due to numerous vendor collaborations in the 5G space. For example, Bharti Airtel and Qualcomm Technologies cooperated in February 2021 to promote the O-RAN Percent G network in India.

? China also boasts the most telecom towers in the world, owned by the state-controlled China Tower Corporation. It has over 1,968,000 towers and is projected to be leasing over 550,000. The country's need for tiny cell towers for outdoor applications is likely to rise when all towers are converted to allow 5G capabilities.

? The Covid-19 epidemic, on the other hand, is predicted to severely impact the small cell tower industry. The implementation of 5G in various areas will be further delayed in the short term, and its services will be the worst hurt. Because 5G gadgets are still considered a specialty, consumers may be unable to afford them. According to a customer poll conducted by GSMA Intelligence, most respondents in most areas had little interest in upgrading to 5G services.

APAC Small Cell Tower Market Trends

Indoor applications are Expected to Have a Major Market Share.

? Spectrum convergence in deploying small cell towers necessitates network design to maximize spectrum use. Small cell towers are increasingly being used for interior applications. For example, Ericsson and China Unicom partnered on the city's largest deployment of the Radio Dot System (at over 500 commercial and residential buildings) to match the high indoor mobile broadband performance standards expected by 5G.

? Furthermore, due to the coronavirus pandemic, tiny cell towers for interior applications are predicted to develop dramatically throughout the projection period, as individuals spend most of their time indoors. People spend 90% of their time indoors, according to the Ericsson ConsumerLab, and 60% of customers are dissatisfied with their indoor cellular coverage.

? Indoor small cell tower deployment is increasing due to widespread use in public venues such as stadiums, retail malls, college campuses, and residential structures. Samsung Networks, for example, is deploying tiny cells in large quantities for Reliance Jio's interior coverage, which is projected to cover over 99 percent of India's population.

? The indoor environment appears suitable for industrial development, with 2021 being designated as a transition year for small cells as the industry responds to macro trends like virtualization, Open RAN, and 5G. As a result, tiny cells will continue to play an important role in improving 5G capacity and interior coverage. As a result, market participants are heavily investing in product innovation.

? For instance, in March 2022, STL, one of the industry-leading digital network integrators, announced the launch of the industry's first end-to-end 5G Enterprise solution, in collaboration with ASOCS and VMWare, to meet the growing demand for private 5G enterprise connectivity for the campus, industrial, and venue applications. Open standards-based architectures will enable these future-ready 5G networks, which will be capable of handling dense settings necessary for smooth indoor coverage.

Adoption of 5G Technology to Drive the Market Demand

? Regarding 5G adoption, the Asia Pacific area is leading the way, with China leading. In May 2022, according to Xinhua, China grabbed the lead in 5G development, having installed 819,000 5G base stations so far, accounting for more than 70% of the worldwide total. Meanwhile, by the end of 2023, China anticipates the 5G users to approach 560 million, accounting for 35 percent of the worldwide total. Furthermore, according to the official announcement, every 10,000 Chinese would have access to more than 18 5G base stations.

? The uptake of 5G services is driven by mergers, acquisitions, and strategic alliances. For example, in August 2021, together with the Yunnan Branch of China Telecom, ZTE Corporation, a major international provider of telecommunications, enterprise, and consumer technology solutions for the mobile internet, has taken the lead in verifying the large-scale commercialization of 40MHz FDD NR on the 2.1GHz frequency band. The results show that 40MHz 2.1GHz networks may be used for end-to-end commercial use and can significantly improve 5G user service experiences.

? South Korea was the first country to commercialize 5G technology, and the number of customers has been steadily increasing. According to South Korea's Ministry of Science and ICT, the country had 12.87 million 5G subscribers at the end of January 2021, following a net gain of about 1 million in the first month.

? Furthermore, telecom providers plan to migrate most of their customers by 2021. For example, SK Telecom, one of the prominent telecom operators that supply 5G small cells, declared in January 2021 that it aimed to reach 9 million 5G consumers. Such year-end targets are aiding the expansion of the small cell market in the country.

? As per GSMA 2022 Report on the mobile economy in China, in 2021, there were 1.61 billion 4G connections with an adoption of 69%, while for 5G, there were 488 million connections with an adoption of 29%. It is forecasted that in 2025, 4G connections will fall to 840 million with an adoption of 48%, while for 5G, it is estimated to rise to 892 million connections with an adoption of 52%.

APAC Small Cell Tower Market Competitor Analysis

The competition in the Asia-Pacific Small Cell Tower Market is moderate. To launch new items, organizations in the market are implementing mergers and acquisitions, strategic collaborations, and product development. The major players are Samsung Electronics Co., Ltd., Parallel Wireless Inc., and Airspan Networks Inc.

? February 2022 - Digital Nasional Berhad (DNB), the Malaysian Research Accelerator for Technology and Innovation (MRANTI), and Ericsson will collaborate to use 5G to expedite the development of innovation clusters. The collaboration includes deploying 5G coverage and capabilities at MRANTI Park - including the establishment of MRANTI's on-campus 5G development center with DNB support - as well as comprehensive knowledge sharing and education efforts for businesses and the community in MRANTI's innovation clusters.

? November 2021 - Samsung built a consistent hybrid cloud infrastructure utilizing Red Hat OpenShift Container Platform and Red Hat OpenShift Data Foundation for storage to meet the rising demand for devices with more processing power and to enable the arrival of 5G. The business is using this new infrastructure to speed up the supply of network and edge processing solutions in a distributed cloud architecture.

Additional Benefits:

  The market estimate (ME) sheet in Excel format
 3 months of analyst support

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