

Wholesale Voice Carrier - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts 2019 - 2029

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Report description:

The wholesale voice carrier market was valued at 32.54 billion in the current year and is expected to register a CAGR of 11.25% during the forecast period to become 55.45 billion by the next five years.

Key Highlights

- Wholesale voice provides cost-effective communications solutions for businesses of all sizes. With hundreds of growth opportunities, this is one way to offer customers high-quality voice services. Benefits of the wholesale voice carrier include feature-rich solutions and customizable features that meet business needs. It is an effective and trusted way to connect with global customers.
- Integrating 5G technology into VoIP services offers several benefits. It allows higher bandwidth, reduces latency, and improves overall performance, which indicates that businesses can benefit from crystal clear voice calls and seamless communications experiences, even in demanding environments. Wholesale VoIP suppliers need to keep up to date with the latest advances in 5G technology and ensure that the infrastructure can reach its full potential to deliver seamless voice services.
- According to GSMA, Socio-economic benefits of mid-band 5G services, as of 2022, 5G is expected to grow from a global market penetration of 13% in 2022 to 64% by 2030, with about 5 billion connections. While these numbers represent global averages, penetration levels vary by region.
- Additionally, with increasing reliance on VoIP services, privacy and security concerns are becoming more vital. Providing VPN access for remote operators adds additional security to VoIP networks. VPNs creates a protected, encrypted tunnel between the VoIP network and the user's device, making it obscure for malicious players to intercept or control data. This is remarkably important for companies with distributed teams or remote workers who rely on VoIP for communication. By offering VPN access, wholesale VoIP suppliers can guarantee that remote users can securely connect to the network and have the same level of security as on-site users.

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-The global COVID-19 pandemic hampered economic growth in most countries. Offices, schools, public places, transportation, and other spaces remain closed, which ultimately hindered the growth of wholesale voice service marketers due to the low communication by voice. The telecommunications sector witnessed declining demand as business communication services reduced and the voice revenue decreased. On the other hand, following the easing of foreclosure restrictions, the sector has emerged with a new model of growth as companies shift to remote and work-from-home.

Wholesale Voice Carrier Market Trends

VoIP Expected to Witness Significant Growth

- Wholesale VoIP is a for-profit telecommunications service in which businesses purchase minutes or volumes of VoIP service from providers at wholesale prices and resell it to their customers. Wholesale VoIP services help businesses improve communication and stay ahead of the market with efficient and cost-effective digital infrastructure.
- As VoIP technology evolves, it allows for more cost-effective and efficient call-routing solutions. Wholesale VoIP suppliers must keep up with technological advances to stay competitive and optimize their operations in the market. Innovations such as voice compression technology and software-defined networking (SDN) significantly impact the costs associated with call termination, thereby affecting wholesale VoIP.
- For many organizations, VoIP is a standard form of voice communication around the world, as it has many advantages over traditional phone systems, including reduced infrastructure, lower installation costs, and cheaper calls. Additionally, VoIP is expected to replace POTS and ISDN soon. Most major companies intend to phase out their existing systems completely by 2025.
- Modern providers such as IDT provide comprehensive wholesale VoIP termination services, making and receiving calls anywhere in the world at significantly reduced prices due to complex negotiations and agreements with many parties in countries around the world.
- Moreover, fifth-generation wireless technology is expected to significantly benefit VoIP technology used by Internet phone systems and unified communications platforms. 5G is anticipated to drive demand for wholesale VoIP in the future due to high-speed connectivity and low latency, making it ideal for VoIP services. 5G adoption is expected to improve the mobile VoIP experience, reinforcing the need for wholesale VoIP solutions to meet this rising demand. According to Ericsson, the number of 5G subscribers is expected to increase from 0.95 billion in 2022 to 4.62 billion by 2028.

North America Accounts for a Significant Share in the Market

- North America is expected to account for a significant market share. The region has a developed infrastructure for telecommunications and is home to several major wholesale voice operators. In particular, the United States has a large customer base and advanced network capabilities. The region's multinational companies and major technology hubs continue to drive demand for international voice communications services.
- Additionally, the growing adoption of 5G in the region is expected to boost the market in the region. For example, according to GSMA, forecasts adjusted based on the impact of the Coronavirus (COVID-19) pandemic predict a near-term slowdown in 5G adoption in North America. However, from 2023 onwards, 5G adoption is expected to surpass previous forecasts, with expectations of 13 million more connections by 2025 than predicted before COVID-19.
- Additionally, as the telecommunications sector grows in the region, operators need reliable partners to exchange voice traffic efficiently. According to a GSMA report, the mobile market in North America started to witness growth in 2021, generating USD 294 billion. Further growth is expected in the coming years, with the market anticipated to generate USD 333 billion by 2025.
- Further, development by market players and the adoption of voice platforms to transform international voice business by

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companies in the region is expected to drive the wholesale voice carrier market in the region.

- For instance, in October 2022, Linxa, a leading wholesale telecommunications software platform, announced that Apelby Communications, a voice wholesaler, selected the Linxa Connect voice platform in order to transform its global voice business. The Linxa Connect voice platform is an integrated end-to-end telecommunications management solution that seamlessly automates and supports voice wholesale processes, from pricing management to routing to quality management and transactions, to invoicing, dispute management, fraud detection, and real-time management.

Wholesale Voice Carrier Industry Overview

The wholesale voice carrier market is experiencing moderate fragmentation, although the concentration ratio among firms is on the rise. Consequently, competitive rivalry within the market is notably intense. Distinguished players in this sector include Verizon, AT&T, BT, Deutsche Telekom AG, and Tata Communications.

In April 2023, Odine, a globally recognized systems integrator, and a sustainable telecommunications transformation partner, revealed its collaboration with Acmetel to launch a global voice services expansion strategy on Odine Nebula. Nebula is poised to offer advanced routing, enhanced visibility, comprehensive reporting, and operational analytics to empower Acmetel in delivering top-tier service quality to its partners.

In November 2022, Symbio Holdings, a leading provider of communication software solutions, introduced Carrier Infrastructure as a Service (ClaaS). This unified suite of carrier-grade products is engineered to simplify the wholesale customer experience by combining essential physical infrastructure with Symbio's extensive virtual components and voice network capabilities. ClaaS is designed to enable cost-effective and high-quality communications services in various regions, including New Zealand, Australia, and Singapore.

In October 2022, Deutsche Telekom Global Carrier and Unified National Networks Brunei (UNN) formalized a cooperation agreement focused on international voice services. UNN has chosen Deutsche Telekom Global Carrier as its preferred partner for routing outbound and inbound international voice traffic through Deutsche Telekom Global Carrier's international voice gateway. This partnership is founded on Deutsche Telekom Global Carrier's innovative international speech synthesis solution, "United Voice," complemented by a tailored "Anti-Fraud" package equipped with machine learning and proactive monitoring capabilities.

Additional Benefits:

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

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