LTE And 5G Broadcast - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts (2025 - 2030)

Market Report | 2025-06-01 | 102 pages | Mordor Intelligence

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Report description:

LTE And 5G Broadcast Market Analysis

The LTE and 5G broadcast market size is USD 1.04 billion in 2025 and is forecast to reach USD 1.78 billion by 2030, advancing at an 11.24% CAGR. Rising demand for spectrum-efficient video delivery, emergency-alert modernization, and rapid device proliferation are expanding commercial trials into nationwide rollouts. Operators are migrating from legacy LTE eMBMS toward 5G FeMBMS to gain multicast flexibility and AI-driven resource allocation, while broadcasters experiment with hybrid ATSC 3.0-5G workflows. Vendors that combine end-to-end cellular and broadcast know-how secure early contracts, and patent filings around Release 18 multicast enhancements hint at new licensing models that could further reshape competition.

Global LTE And 5G Broadcast Market Trends and Insights

Rising demand for mobile video and live event streaming

Operators pivot to multicast to curb unicast congestion as mobile viewers demand 4K, 360-degree, and augmented-reality feeds. Deutsche Telekom and Ericsson delivered sub-25 ms latency and 500 Mbps uplinks for Euro 2024 wireless cameras, proving viability for professional production. Malaysia streamed its National Day parade over a network-sliced 5G link, ensuring stable quality even at peak load. Broadcasters now request 50 Mbps sustained uplink per camera, a requirement met only when several viewers share the same multicast flow. Verizon has added AI-based audience-density recognition inside its private 5G broadcast suite to fine-tune bitrate in real time.

Surge in 5G-enabled device penetration

NTT Docomo demonstrated 6.6 Gbps downlink on 5G Stand-Alone, signaling handset readiness for high-bitrate broadcast reception. BMW equips all 2025 models with 5G antennas to stream broadcast content and push simultaneous firmware updates. China's mandate that premium phones support 700 MHz expanded the installed base capable of FeMBMS reception, accelerating service availability. While broadcast-specific chipsets remain scarce, automotive infotainment suppliers are integrating them first, creating a beachhead for wider consumer adoption.

High CapEx for broadcast-capable upgrades

Adding multicast controllers, re-tuning antennas, and deploying dense mmWave small cells can raise per-site cost by 50% versus data-only 5G. Nokia noted weaker equipment orders in 2024 as operators deferred broadcast modules to preserve cash. mmWave broadcast, essential for stadiums, needs 1.5-2□ more base stations than Sub-6 GHz, further stretching budgets. Some carriers adopt phased rollouts, enabling broadcast only on 10% of cells that carry 70% of peak video traffic, yet this tactic elongates nationwide coverage timelines.

Other drivers and restraints analyzed in the detailed report include:

Spectrum-efficiency gains via 5G FeMBMS multicast / Emergency-alert modernization mandates / Limited chipset/device support for FeMBMS /

For complete list of drivers and restraints, kindly check the Table Of Contents.

Segment Analysis

Live Event Streaming retained 28% of 2024 revenue by exploiting marquee sports and cultural broadcasts that demand guaranteed quality levels. Still, Connected Vehicles will post a 12.12% CAGR through 2030 as automotive OEMs push over-the-air updates to millions of cars simultaneously, a task unicast networks struggle to scale. BMW's fully 5G-equipped model line and Tesla's factory private networks show broadcast's dual role in production analytics and in-vehicle infotainment. The LTE and 5G broadcast market underpins remote diagnostics, V2X safety messages, and map data refresh without user intervention.

A second growth lane appears in public safety. FirstNet's upgrade adds multicast drone imagery and real-time body-camera feeds that improve situational awareness for first responders. Mobile TV and video on demand rely on broadcast to reduce backhaul in flash-crowd situations like election nights, while advertising networks test location-based multicast spots that insert local offers into a national video stream. These varied use cases cement application-layer diversity and maintain resilience against single-segment downturns.

LTE eMBMS still commands 61% of the LTE and 5G broadcast market share in 2024 on the strength of earlier deployments, yet 5G FeMBMS grows 14.23% annually as operators overlay Release 18 software onto existing 5G cores. China Mobile's 100-city launch validated FeMBMS scalability, and plans to triple coverage by 2025 illustrate aggressive timelines. Operators appreciate FeMBMS's seamless switch between unicast and multicast when audience thresholds are met, thereby optimizing every megahertz.

ATSC 3.0 hybrid broadcast gives terrestrial media companies an entry point to mobile distribution. Brazil's roadmap to nationwide ATSC 3.0 by the 2026 World Cup and ongoing FCC trials in the United States demonstrate convergent cellular-terrestrial standards. Release 18's AI schedulers cut cell-edge packet loss and boost mobility, benefits that accrue across both LTE and 5G implementations. As device ecosystems mature, the transition narrative will shift from coexistence to sunset planning for LTE

eMBMS in the next decade.

The LTE and 5G Broadcast Market Report is Segmented by Application (Public Safety, Connected Vehicles, Advertising, and More), Broadcast Technology (LTE EMBMS, 5G FeMBMS, and More), Frequency Band (Sub-6 GHz (less Than 6 GHz), L-Band (1-2 GHz), and More), End User (Mobile Network Operators, Automotive OEMs, and More), and Geography.

Geography Analysis

Asia Pacific commands 38% of 2024 revenue and grows at 14.43% CAGR. Government-backed 5G-Advanced rollouts in China, Japan, and South Korea embed multicast from day one. China Mobile's coverage of 100 cities, expanding to 300 in 2025, serves UHD streaming, industrial IoT, and mass alerts on the same platform. Japanese operators added 20% more base stations in 2024, pairing mid-band with mmWave for broadcast in dense metros. South Korea complements consumer focus with private 5G grants for factories, accelerating broadcast adoption in manufacturing and logistics.

North America ranks second, propelled by the FirstNet Authority's USD 8 billion ten-year plan, including USD 6.3 billion earmarked for broadcast-centric 5G enhancements. Automotive majors-Ford, GM, Tesla-install private 5G to synchronize plant robots and push software to vehicles overnight. The device ecosystem is mature, yet CapEx discipline tempers rapid nationwide broadcast upgrades.

Europe advances on regulatory harmonization. The European Broadcasting Union's hybrid 5G/satellite pilot reduces rural coverage gaps while complying with EU Green Deal energy targets. Germany leads automotive broadcast integration; BMW's 5G connectivity plan covers both assembly lines and post-sale updates. Smaller regions-Middle East, Africa, South America-mirror overall 5G timelines; where spectrum auctions conclude early, broadcast trials begin within 18 months, albeit at modest scale.

List of Companies Covered in this Report:

Huawei Technologies Co. Ltd. / ZTE Corporation / Ericsson AB / Nokia Corp. / Qualcomm Technologies Inc. / Samsung Electronics Co. Ltd. / KT Corporation / Verizon Communications Inc. / AT&T Inc. / China Unicom (HK) Ltd. / SK Telecom Co. Ltd. / KDDI Corporation / Telstra Corp. Ltd. / Reliance Jio Infocomm Ltd. / Rohde and Schwarz GmbH / Enensys Technologies SA / Harmonic Inc. / Ateme SA / MediaTek Inc. / Rohde & Schwarz GmbH & Co KG /

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