Network Slicing - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts (2025 - 2030)

Market Report | 2025-06-01 | 120 pages | Mordor Intelligence

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Report description:

Network Slicing Market Analysis

The Network Slicing Market size is estimated at USD 1.92 billion in 2025, and is expected to reach USD 13.49 billion by 2030, at a CAGR of 41.66% during the forecast period (2025-2030).

The shift from best-effort connections to programmable, service-differentiated networks is the prime catalyst, enabling communication service providers (CSPs) to monetize 5G standalone (SA) investments through virtual network segments with guaranteed service levels. Rapid 5G SA roll-outs, the need for ultra-reliable low-latency communication (URLLC) in Industry 4.0 plants, and the appeal of slice-as-a-service models are accelerating adoption. Competitive intensity is rising as infrastructure vendors, cloud-native software specialists, and hyperscalers race to deliver orchestration platforms that automate slice life-cycle management. Supply-chain constraints persist, notably 56-week semiconductor lead times, yet operators continue to prioritize software investments to capture developer-led revenue streams through network-as-code APIs.

Global Network Slicing Market Trends and Insights

5G SA Roll-Outs Accelerating CSP Demand Shift

Standalone 5G architecture unlocks full network slicing capabilities, letting operators spin up isolated logical networks with guaranteed service levels that legacy cores cannot provide. Japan reached 98% 5G base-station coverage in designated areas by

April 2024, spurring SA upgrades and signaling a global pivot toward slicing-ready infrastructure. Ericsson's alliance with 12 tier-one operators targets a USD 30 billion network-API market by 2030, relying on slicing as the foundation for programmability. T-Mobile's hybrid private-5G-plus-slicing deployment for emergency medical data shows how differentiated connectivity can be commercialized quickly.

Enterprise Private-Network Demand for URLLC & eMBB Slices

Industrial companies view slicing as the most economical route to deterministic connectivity. In Italy, Ericsson, TIM, and Comau synchronized robots with digital twins using sub-10 ms slices, proving operational gains in predictive maintenance and remote AR support. South Korea allocated private 5G spectrum to 56 sites by February 2024, illustrating regulator support for enterprise-run infrastructure that relies on slice isolation.

Low 5G Penetration and Device Readiness in Emerging Economies

Network slicing demands widespread SA coverage plus handsets able to select slices, yet Europe had only 2% SA coverage versus China's 80% at end-2024. Delays in Indonesia's 5G auctions illustrate how policy gaps can slow roll-outs, reducing operator incentive to invest in slice platforms.

Other drivers and restraints analyzed in the detailed report include:

Edge-Cloud Convergence Enabling Dynamic Slice Orchestration / CSP Monetization Urgency Amid ARPU Stagnation / Multi-Domain Orchestration Complexity and OPEX Burden /

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

Segment Analysis

Software held a 45.50% share of the network slicing market in 2024 and is growing at a 44.25% CAGR, thanks to operator focus on orchestration, assurance, and security tooling. The network slicing market size derived from software platforms is projected to exceed USD 6 billion by 2030 alongside radio-agnostic control logic. Vendors differentiate through intent-based policy engines that adjust slice bandwidth in real time. Security modules that isolate tenant traffic and validate slice integrity are now baked into catalogues rather than sold as add-ons, lowering time to market and supporting multitenant monetization. Infrastructure hardware remains essential for 5G SA cores, yet its growth lags as CSPs sweat existing RAN assets while directing new funds to automated slice management. Transport upgrades continue, spurred by the need to guarantee deterministic latency across microwave, fiber, and IP/MPLS links.

Operators evaluating total cost of ownership favor disaggregated infrastructure with open interfaces, allowing cloud-native network functions to reside on commodity servers. This pivot moderates capex peaks and accelerates software uptake, reinforcing the central role of automation in the network slicing market. Multi-access edge computing (MEC) nodes embedded in metro data centers further extend software's reach, enabling localized slice instantiation for latency-sensitive workloads.

Managed services controlled 55.45% of the network slicing market share in 2024 and should post a 42.36% CAGR, reflecting enterprise preference for turnkey slice-as-a-service offerings. Vendor-operated portals now let IT managers request slices on demand, set quality-of-service tiers, and receive usage-based billing. The network slicing market size tied to managed services will likely surpass USD 7 billion by 2030 as CSPs bundle security and edge compute with connectivity. Network-as-a-service (NaaS) variants appeal to mid-market firms lacking in-house spectrum expertise, while government agencies adopt managed slices for public-safety footage, benefiting from sovereign data-hosting guarantees.

Professional services, including consulting, integration, and testing, serve as on-ramps for complex adoption cycles. Systems integrators align slice orchestration with enterprise SD-WAN, ERP, and IoT platforms, de-risking deployment. Proof-of-concept labs validate throughput and latency targets before commercial cut-over, reducing uncertainty for mission-critical use cases such as surgical robotics or real-time quality inspection.

The Network Slicing Market Report is Segmented by Component (Infrastructure [RAN, Core, Transport] and Software [MANO, Analytics, Security]), Service (Professional [Consulting, Integration, Testing] and More), Application (Remote Monitoring & Surveillance, Network Function Virtualization and Cloud RAN, and More), End-User Industry (Healthcare, Automotive and Transportation, and More), and Geography.

Geography Analysis

North America held a 34.92% share of the network slicing market in 2024, anchored by early 5G SA launches and permissive spectrum policies. CSPs such as T-Mobile expose slice order APIs nationwide, letting enterprises stitch private coverage into public footprints. Verizon's Frontline Network Slice caters to first responders in Los Angeles and Chicago, generating incremental revenue via premium SLA tiers. Venture capital flows into orchestration start-ups, reinforcing an innovation loop that favors cloud-native design. Semiconductor shortages have lengthened radio unit lead times to 56 weeks, yet operators remain on schedule thanks to multi-vendor sourcing.

Asia Pacific is projected to deliver a 42.22% CAGR, the fastest regional pace, as China surpasses 2.28 million 5G sites and regulators expedite enterprise slice pilots. Japan's Ministry of Internal Affairs and Communications issues local 5 G licenses that let factories self-deploy SA networks; 72 demonstration projects now span smart ports, logistics hubs, and stadiums. South Korea allocates dedicated spectrum to 35 conglomerates, stimulating a supplier ecosystem around slice-aware devices and RAN automation.

Europe lags on SA coverage at 2%, constraining near-term slice revenues, yet policy is shifting. Seven nations opened the 26 GHz band for local 5G, and six permit up to 100 MHz in the 3.4-3.8 GHz band, enabling campus networks for manufacturing and research. The USD 20.28 billion Vodafone-Three UK merger pledges USD 14.86 billion in network upgrades by 2035, which should accelerate SA and slicing adoption. In the Middle East, European vendors pilot transport-network slicing with regional operators, validating architectures that may backfill Europe once spectrum and investment converge.

List of Companies Covered in this Report:

Ericsson / Huawei Technologies / Nokia / Cisco Systems / Samsung Electronics / ZTE / NEC / BT Group / NTT DOCOMO / Mavenir / Affirmed Networks / Argela Technologies / Aria Networks / Juniper Networks / Keysight Technologies / NetScout / Verizon Communications / ATandT / T-Mobile US / Deutsche Telekom /

Additional Benefits:

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

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