

Middle East And Africa Telecom MNO - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts (2026 - 2031)

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Report description:

Middle East And Africa Telecom MNO Market Analysis

Middle East And Africa Telecom MNO Market size in 2026 is estimated at USD 381.79 billion, growing from 2025 value of USD 345.04 billion with 2031 projections showing USD 633.38 billion, growing at 10.65% CAGR over 2026-2031.

Rapid 5G deployments, expanding fiber backhaul, and rising smartphone penetration combine to keep the region on a structurally high-growth trajectory. Investment intensity remains elevated: Egypt paid USD 150 million for its first 5G license, while Saudi Arabia pushed 5G Fixed Wireless Access (FWA) to 78% population coverage in 2025. Morocco committed USD 475 million to reach 25% 5G coverage by end-2025, underscoring a broad policy focus on next-generation access. Competitive pressure from low-earth-orbit (LEO) satellite broadband and geopolitical risks around the Red Sea cable corridor temper sentiment, but are offset by enterprise digitalization and mobile-money-driven ARPU gains.

Middle East And Africa Telecom MNO Market Trends and Insights

Explosive growth in mobile data traffic from video-centric apps

Video viewing reshapes operator revenue architecture as users pivot from voice and SMS to high-definition streaming. SMS revenue in the Gulf fell from USD 4.3 billion in 2013 to a projected USD 3.2 billion in 2018, while mobile data volumes rose 180% in the same span. Operators respond by densifying 5G small cells; the MENA small-cell market is projected to reach USD 412.54

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million by 2030, a 40.9% CAGR . FWA subscriptions, priced near USD 70 each month, monetize in-home streaming traffic without fresh fiber builds. Network planners now weigh the cost of massive-MIMO upgrades against the rising willingness of premium users to pay for gigabit packages. In Sub-Saharan Africa, monthly data usage is forecast to triple to 14 GB per user by 2030, demanding parallel investment in both spectrum and backhaul.

Accelerated 4G and 5G roll-outs enabled by supportive spectrum auctions

Regulators across the Gulf and North Africa now favor coverage targets over windfall auction fees. Saudi Arabia's 2025-2027 Spectrum Outlook sets aside new bands for non-terrestrial networks and FWA via light licensing, slashing time-to-market for operators. South Africa's draft 2025 National Radio Frequency Plan similarly carves out dedicated private-network spectrum that encourages industrial 5G . The UAE already operates 7,000 5G sites, with a policy aiming for 500 on-campus private networks by 2025. Concurrent 2G/3G switch-offs in Bahrain, Jordan, Kuwait, and Saudi Arabia release low-band spectrum for 5G, further boosting spectral efficiency. The collective result is faster rural broadband coverage and lower per-bit delivery cost, crucial for sustaining the Middle East and Africa telecom MNO market's profit pool.

Aggressive price competition and SIM registration curbing ARPU

Mandatory biometric SIM registration raises compliance costs even as new entrants trigger price wars in markets like Kenya and Ghana. Inflation adds a second squeeze by eroding consumer spend capacity, while regulators cap tariff hikes to protect households. Operators counter with content bundles and loyalty apps, but execution is uneven in fragmented regulatory environments, restraining monetization in the Middle East and Africa telecom MNO market.

Other drivers and restraints analyzed in the detailed report include:

Enterprise digitization fueling IoT/M2M connectivity demand
Youth-driven smartphone adoption across Sub-Saharan Africa
Geopolitical instability delaying infrastructure investment

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

Segment Analysis

Data and Internet plans accounted for 39.35% of 2025 revenue, making them the single largest contributor to the Middle East and Africa telecom MNO market. IoT/M2M is the standout, expanding at a CAGR of 10.74% in the Middle East and Africa telecom MNO market size by 2031. Voice and messaging together will slip below 25% as OTT platforms cannibalize usage. Operators respond by zero-rating video services and bundling PayTV to sustain stickiness. Edge computing nodes and API monetization emerge as adjacent revenue streams that complement data plans.

Over the forecast horizon, Apps-as-a-Service models will lean on 5G standalone cores, opening low-latency use cases in gaming and telemedicine. Roaming and wholesale traffic, once cyclical, stabilize as intra-Africa trade flows broaden. Average data pricing will continue its southward drift but remain offset by strong volume elasticity, supporting the Middle East and Africa telecom MNO market size expansion.

The Middle East and Africa Telecom MNO Market is Segmented by Service Type (Voice Services, Data and Internet Services, Messaging Services, IoT and M2M Services, OTT and PayTV Services, and Other Services), End User (Enterprises, Consumer), and Geography. The Market Forecasts are Provided in Terms of Value (USD) and Volume (Subscribers).

List of Companies Covered in this Report:

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e& (Etisalat Group) STC Group Ooredoo Group Zain Group MTN Group Vodacom Group Orange Middle East and Africa Airtel Africa Safaricom PLC Maroc Telecom SA Telecom Egypt (WE) Globacom Limited (Glo Mobile) 9mobile (EMTS) Telkom SA SOC Limited Cell C Omantel Batelco (Beyon Group) du (EITC) Sudan Telecom Group Limited (Sudatel) Ethio Telecom AXIAN Telecom Econet Wireless Zimbabwe MTC Namibia

Additional Benefits:

The market estimate (ME) sheet in Excel format

3 months of analyst support

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