

4Q22 WIRELESS INFRASTRUCTURE - FEBRUARY 2023

Quarterly Update - 2G/3G/4G/5G Radio Access & Core Networks

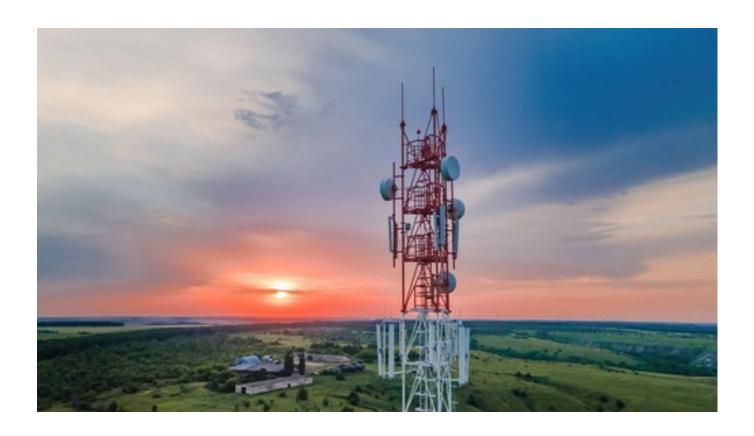




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5G RAN PEAKED IN 2022	5
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Due to the equilibrium, it remains musical chairs between the Chinese and the European duos	11
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In core networks, the bulk of $5G$ core sales again came from China in $4Q22$: Huawei and ZTE combined	
COMMAND A 63% MARKET SHARE	
In 4G core, Huawei maintained its lead, followed by Ericsson	
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WE HAVE PASSED THE PEAK, WE HAVE ENTERED THE DISINVESTMENT CYCLE, 2023 WILL BE ITS	4.0
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Ironically, geopolitics fueled both the open RAN ecosystem and traditional 5G RAN rollouts led by Erics	
Nokia, and Samsung	
Home to the world's largest wireless network footprints, Asia Pacific will remain the largest market.	
NORTH AMERICA WILL REMAIN THE WORLD'S SECOND LARGEST WIRELESS INFRASTRUCTURE MARKET AFTER ASIA PACIF	
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Abstract

This report analyzes the 4Q22/FY22 wireless infrastructure market worldwide and covers 2G, 3G, 4G and 5G radio access network (RAN) and core network nodes. It presents historical data from 2016 to 2022, quarterly market size and vendor market shares, and a detailed market forecast through 2028 for 2G/3G/4G/5G RAN, including Open vRAN, and core networks (EPC, vEPC, and 5GC), for each region (North America, Europe Middle East Africa, Asia Pacific, Caribbean Latin America). The historical data accounts for the sales of more than 30 wireless infrastructure vendors, including a few vendors that shared confidential sales data with LightCounting. The market forecast is based on a model correlating wireless infrastructure vendor sales with 20 years of service provider network rollout pattern analysis, and upgrade and expansion plans.