

A network diagram with black nodes and blue lines connecting them, set against a light blue background with a dark blue vertical bar on the right.

2024

WIRELESS INFRASTRUCTURE SAMPLE REPORT

Get an in-depth analysis of the current state, trends, and future of the wireless infrastructure technology market, including insights into key drivers, changing product lifecycles, and manufacturing challenges.

JABIL

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1. Introduction

2024 marks a pivotal point in the evolution of the wireless infrastructure market. As our reliance on data consumption and seamless connectivity grows, the underlying network that supports the demand is undergoing significant transformation. This report delves into the key trends, challenges, and opportunities shaping the wireless infrastructure landscape over the next year.

The emergence of Open Radio Access Networks (Open RAN) is a game-changer. It promises to shift the wireless network landscape by fostering greater flexibility and interoperability. Unlike traditional, closed RAN systems, Open RAN allows network operators to mix components from different suppliers, offering greater flexibility in network design. This approach could potentially lead to cost savings and innovation while promoting vendor neutrality and fostering competition within the market.

The smart home market in North America is characterized by its industry focus on enhancing convenience, energy efficiency, and security. The region boasts significant growth in integrating AI and voice control, primarily through devices like Amazon's Echo and Google Home, which have become household staples. The advancement is propelled by consumers prioritizing compatibility between different devices and systems, aiming for a seamless smart home experience. Despite its advances, the market continues to face increased challenges related to privacy concerns and the complexity of device setup, which requires a certain level of IT expertise.

Europe's smart home market thrives on a solid commitment to sustainability and energy efficiency. Environmental awareness and a collective drive towards sustainable living practices significantly influence the region's focus. Smart meters and energy management systems are particularly popular, catering to the demand for devices that reduce energy consumption. Additionally, there's a growing trend towards enhanced home security systems. This increase is partly driven by regional conflicts and geopolitical tensions, which, along with shifting migration patterns, have led to a rise in domestic crime rates. Consequently, there's a heightened demand for advanced security products, including surveillance cameras and motion sensors, to ensure household safety. Moreover, the aging population in Europe represents another critical segment, with smart home solutions focusing on safety and accessibility to cater to their needs.

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2. Industry Overview

2.1 Market Outlook

The smart home market in North America is characterized by its rapidly growing and evolving consumer base, energy efficiency, and security. The region leads significant strides in adopting AI and voice control, primarily through devices like Amazon's Echo and Google Home, which have become household staples. The advancement is propelled by consumers prioritizing compatibility between different devices and systems, aiming for a seamless smart home experience. Despite its advances, the market continues to face increased challenges related to privacy concerns and the complexity of device setup, which requires a certain level of IT expertise.

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2.2 Regional Outlook

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2.2.1 North America

North America holds the current crown in the wireless infrastructure market, fueled by a robust foundation. The region boasts a high penetration of LTE and 4G services, driven by the presence of major players like the United States and Canada.

The smart home market in North America is characterized by its maturity, focusing on enhancing convenience, energy efficiency, and security. The region leads significant strides in integrating AI and voice control, primarily through devices like Amazon's Echo and Google Home, which have become household staples. This advancement is propelled by consumers prioritizing compatibility between different devices and systems, aiming for a seamless smart home experience. Despite its advances, the market continues to face increased challenges related to privacy concerns and the complexity of device setup, which requires a certain level of IT expertise.

2.2.2 Asia Pacific

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2.2.3 Europe

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2.3 Segment Outlook

2.3.1 5G

5G deployment will be a significant focus, with operators investing heavily in network upgrades and infrastructure expansion. Advancements in 5G Stand-Alone (SA) architecture are expected to enable network slicing for diverse applications like ultra-reliable low-latency communication (uRLLC) and massive machine-type communication (MTC).

Research and development (R&D) efforts in 6G technologies will pick up pace in 2024. Areas will likely include even higher data rates, lower latency, and support for many connected devices. Initial

2.3.2 O-RAN

The smart home market in North America is characterized by its maturity, focusing on enhancing convenience, energy efficiency, and security. The region leads significant strides in integrating AI and voice control, primarily through devices like Amazon's Echo and Google Home, which have become household staples. This advancement is propelled by consumers prioritizing compatibility between different devices and systems, aiming for a seamless smart home experience. Despite its advances, the market continues to face increased challenges related to privacy concerns and the complexity of device setup, which requires a certain level of IT expertise.

2.3.3 Hyperscalers

The cloud native market in North America is characterized by its industry focus on enhancing performance, energy efficiency, and security. The region leads significant strides in integrating AI and edge control, primarily through devices like Amazon's Echo and Google Home, which have become household staples. The advancement is propelled by consumers prioritizing compatibility between different devices and systems, aiming for a seamless smart home experience. Despite its advances, the market continues to face increased challenges related to privacy concerns and the complexity of device setup, which requires a certain level of IT expertise.

2.4 Market Dynamics

2.4.1 Growth Enablers

2.4.1.1 Rising Demand for 5G

The rollout of 5G networks is a significant catalyst for growth in the wireless infrastructure market. 5G promises a revolution in mobile connectivity, offering ultra-fast speeds, significantly lower latency, and vastly enhanced capacity. This translates to a surge in demand for improved wireless infrastructure to ensure users can fully experience these benefits.

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2.4.1.2 Increasing Data Usage

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2.4.1.3 Technological Advancements

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2.4.1.4 Government Initiatives

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2.4.2 Growth Inhibitors

While the wireless infrastructure market is experiencing significant growth, several key challenges remain. These challenges can hinder the adoption and optimal performance of next-generation technologies like 5G.

2.4.2.1 High Costs

Building and maintaining a robust wireless infrastructure is expensive, especially for cutting-edge technologies like 5G. The financial burden starts with securing spectrum licenses. These licenses grant operators the exclusive right to use specific radio frequencies within a

designated area. However, obtaining these licenses can be competitive and costly, particularly in densely populated urban areas with high demand for bandwidth.

The smart home market in North America is characterized by its maturity, focusing on enhancing convenience, energy efficiency, and security. The region leads significant strides in integrating AI and voice control, primarily through devices like Amazon's Echo and Google Home, which have become household staples. The advancement is propelled by consumers prioritizing compatibility between different devices and systems, striving for a seamless smart home experience. Despite its advances, the market continues to face increased challenges related to privacy concerns and the complexity of device setup, which requires a certain level of IT expertise.

2.4.2.2 Technical Challenges

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2.4.2.3 In-Building Wireless Challenges

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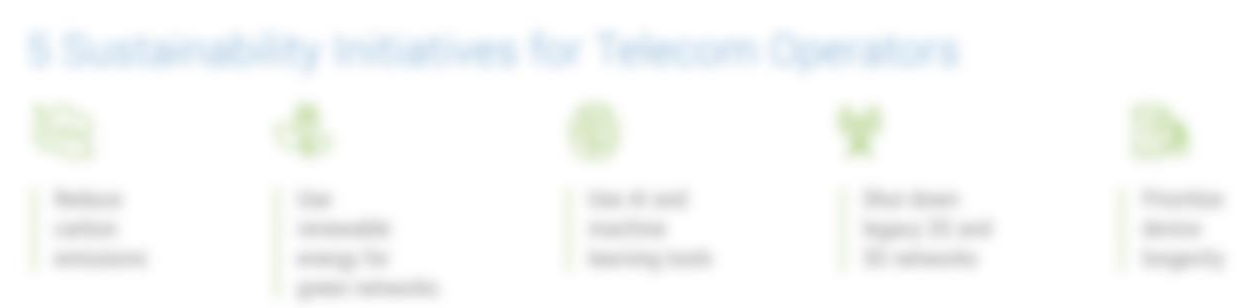
2.4.2.4 Absence of “Killer app” for 5G

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3. Supply Chain

3.1 Sustainability

The telecommunications industry is actively seeking solutions to minimize its environmental footprint. A 2022 report by GSMA, the mobile industry trade body, revealed a significant increase in operator commitment to sustainability. The number of operators pledging to reduce their carbon footprint over the next decade has more than doubled since 2021. Furthermore, nearly half of all operators, representing 44% of global telecom revenue, have committed to achieving net-zero emissions by 2050. The environmental impact of mobile technology is undeniable. As per the TechTarget sustainability report, A typical mobile connection generates roughly 59 kilograms of carbon dioxide annually, a significant amount compared to other activities. However, this pales compared to the emissions associated with air travel, highlighting the potential for positive change within the mobile sector.



Five strategies are driving sustainability efforts in the Wireless industry.

Here's a closer look at some of the significant sustainability initiatives being undertaken:

Reducing Carbon Emissions

The smart home market in North America is characterized by its rapidly growing and evolving ecosystem, energy efficiency, and security. The major trends significant in this market are integrating AI and voice control, primarily through devices like Amazon's Echo and Google Home, which have become household staples. This advancement is propelled by consumers' growing compatibility between different devices and systems, setting for a seamless smart home experience. Despite its advances, the market continues to face increased challenges related to privacy concerns and the complexity of device setup, which requires a certain level of IT expertise.

Embracing Renewable Energy and Green Networks

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Leveraging AI and Machine Learning

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3.2 Circular Economy

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3.2.1 Reshoring and Nearshoring

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3.2.2 Covid-19 & Semiconductor scarcity

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4. Technology Evolution

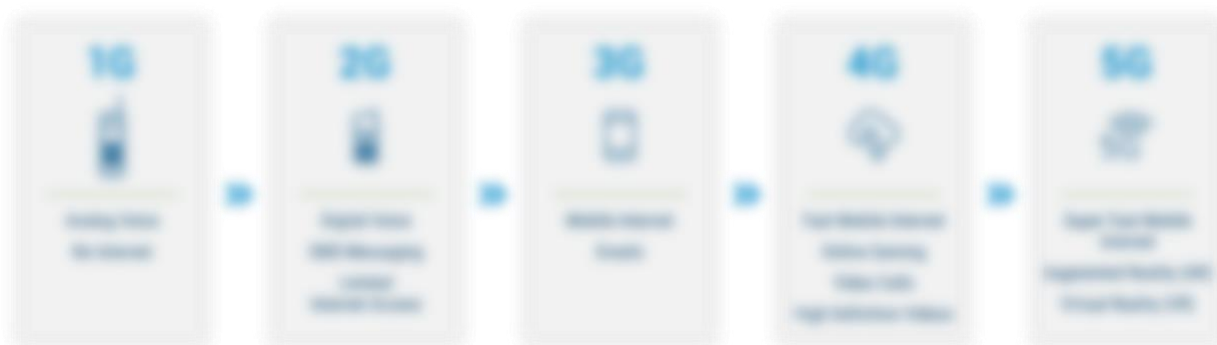
4.1 Evolution of 1G to 5G

Since its inception, wireless technology has undergone a remarkable transformation. This journey, marked by five distinct generations (1G to 5G), has revolutionized how we connect and interact with the world.

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Mobile Networks Evolution



4.2 6G Technology

The 6G wireless market in North America is characterized by its reliance on artificial intelligence, energy efficiency, and security. The region leads significant efforts in developing AI and edge control, primarily through 5G and 6G networks, which are essential for various applications. The advancement is supported by continued growing connectivity between different devices and systems, driving for a seamless user experience. Despite its advances, the market continues to face increased challenges related to privacy concerns and the complexity of device integration, which require a careful and strategic approach.

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4.3 NVF

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4.4 Blockchain

The smart home market in North America is characterized by its reliance on security, focusing on enhancing convenience, energy efficiency, and security. The region tracks significant growth in integrating AI and voice control, primarily through devices like Amazon's Echo and Google Home, which use secure protocols to manage data. The advancement is propelled by consumers prioritizing compatibility between different devices and systems, aiming for a seamless smart home experience. Despite its advances, the market continues to face increased challenges related to privacy concerns and the complexity of device setup, which requires a certain level of IT expertise.

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5. Jabil Insights

5.1 Current Market Outlook – Analyst Perspective

The wireless infrastructure market 2024 is characterized by a growing interest in Open Radio Access Networks (Open RAN) alongside lingering cost concerns. While Open RAN offers the benefit of greater flexibility and interoperability between equipment from different vendors, its current reliance on Field-Programmable Gate Arrays (FPGAs) makes it pricier compared to traditional radios built with Application-Specific Integrated Circuits (ASICs).

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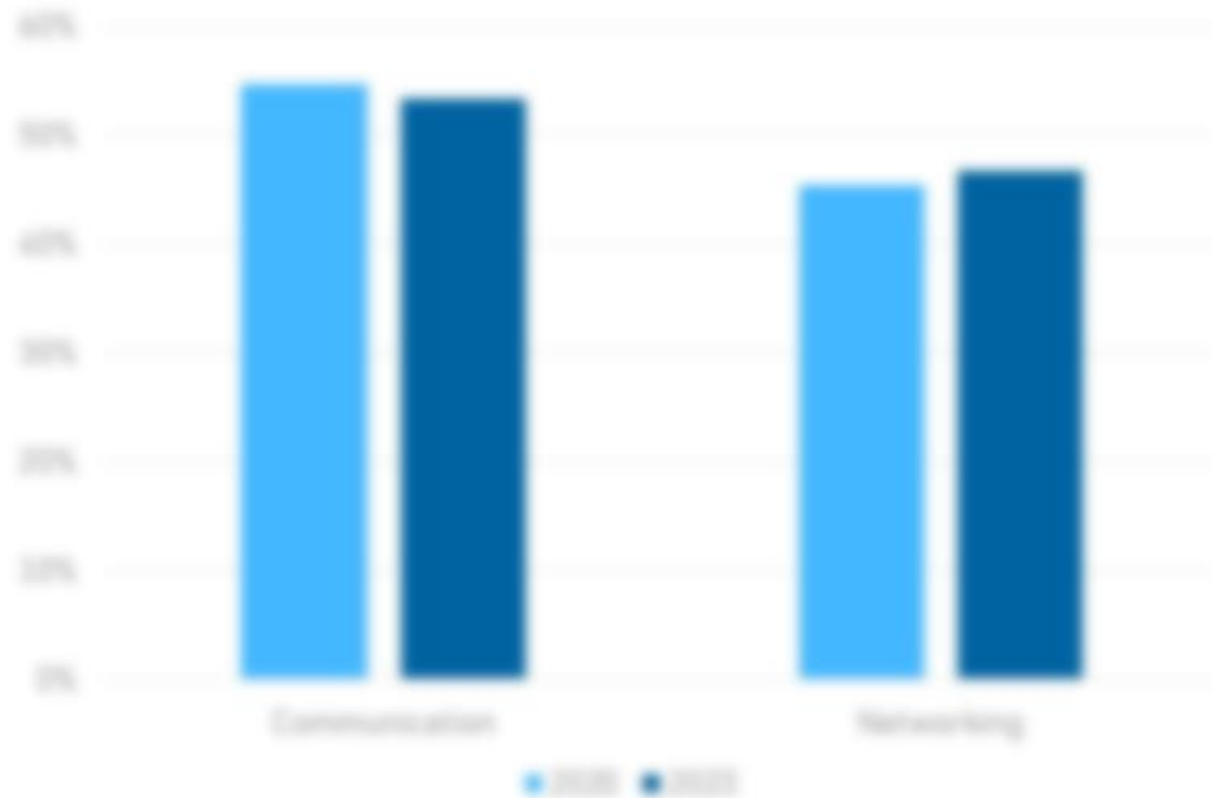
5.2 Strategic Considerations

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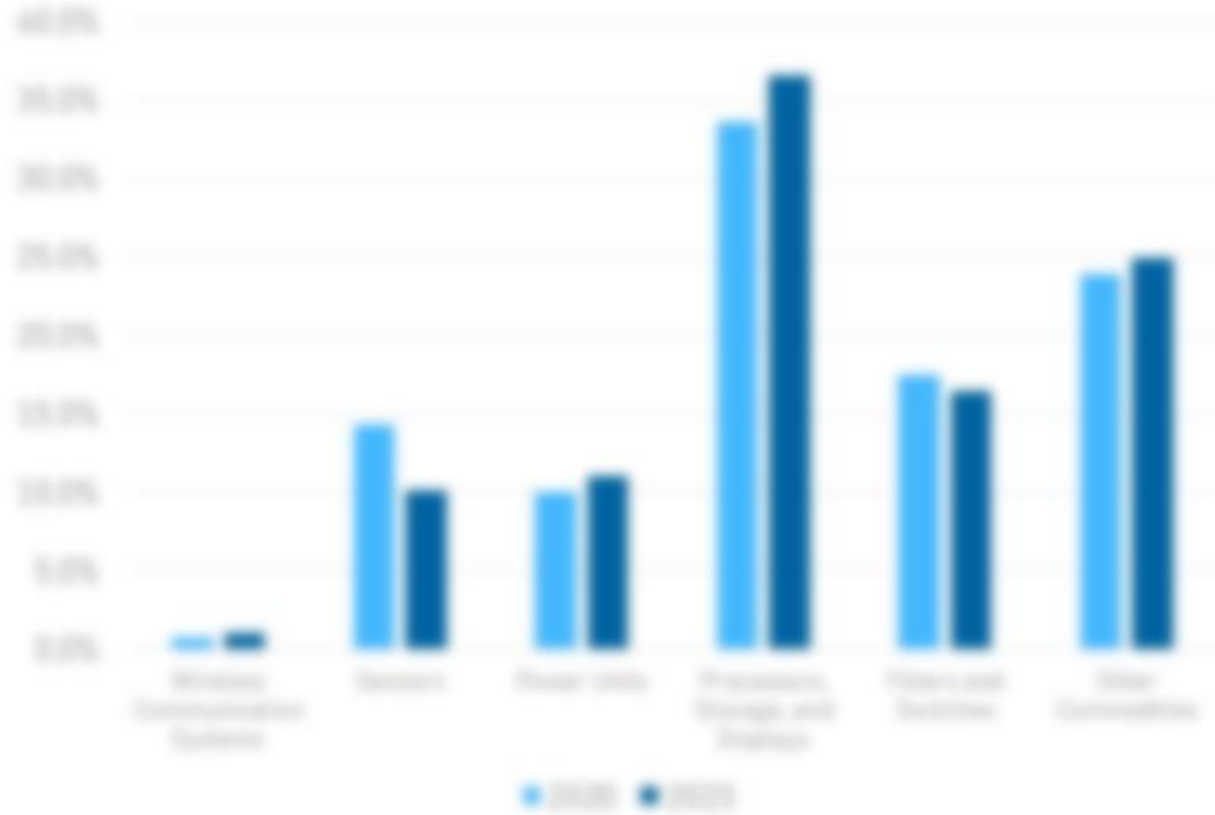
5.3 Jabil Spend Analysis

5.3.1 Spend Breakdown of Wireless Infrastructure Sectors (2020 Vs 2023)



Data based on Jabil's historical spend data for Wireless Infrastructure Customer Segment

5.3.2 Spend Breakdown of Wireless Infrastructure Commodities (2020 Vs 2023)



Data based on Jabil's historical spend data for Wireless Infrastructure Customer Segment

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