

**U.S. Manufacturing
Buildings and
Factories: *Cellular
In-building Wireless
Spending Forecast,
2020-2025***

Market Study
Second Quarter 2021





U.S. Manufacturing Buildings and Factories: *Cellular In- building Wireless Spending, 2020-2025*

Market Study

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Abstract

There are many thousands of U.S. manufacturing buildings, such as factories, assembly plants and mills. With the advent of 5G New Radio (NR) as the next “G” in the evolution of cellular technologies, 5G, whether it is deployed on sub 6 GHz, CBRS or mmWave spectrum, is seen as a way to enable the factory floor with very high throughput, ultra-reliable and low latency cellular solutions. This is seen as the path toward the “smart factory.”

This market study provides a revised forecast of the cellular in-building wireless (IBW) market for manufacturing buildings. *iGR* found that due to the pandemic, the IBW market for 2020 and beyond is significantly different than it was previously. The 2021 revised forecast was modeled with:

- New data and assumptions regarding the (ongoing) COVID-19 pandemic
- Information gathered from conversations with multiple solution providers in the IBW market.

Included in the market study is a five-year forecast for both network build spending and operational spending for the deployment of cellular IBW in U.S. manufacturing buildings in the sub 6 GHz, CBRS, and mmWave bands.

Key questions addressed in this study:

- What is a manufacturing building or factory? What applications and services are enabled in a manufacturing building?
- How has COVID-19 impacted the IBW market for manufacturing buildings?
- How much will be spent to build and operate sub 6 GHz, CBRS and mmWave IBW systems in U.S. manufacturing buildings from 2020 to 2025?
- What technologies are required for a smart manufacturing building?
- What are 5G, CBRS, and mmWave, some of the technologies and spectrums that will support cellular IBW?

This market study is recommended for:

- Mobile operators, particularly those servicing the U.S. market



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- Mobile backhaul providers, including telcos and cable MSOs
- Wired and wireless backhaul vendors and solution providers
- Mobile OEMs, particularly those servicing the U.S. market
- Wired and wireless infrastructure vendors, particularly those servicing the U.S. market
- Financial and investment analysts.



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