U.S. Warehouse and Storage Buildings: Cellular In-building Wireless Spending, 2020-2025

Market Study
Second Quarter 2021

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Abstract

Warehouse and storage buildings in the U.S. support many industry sectors. For example, manufacturers use the buildings to store their inputs and outputs, and retailers rely on distribution and shipping centers.

In-building wireless (IBW) systems can be deployed in warehouse and storage buildings to support smart warehouse functionality, such as automation systems, IoT installations and robots.

This market study provides a revised forecast of the cellular in-building wireless (IBW) market for warehouse and storage buildings. *iG*R 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
- Newly available data (November 2020) from the Commercial Buildings Energy Consumption Survey (CBECS)
- 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. warehouse and storage buildings in the sub 6 GHz, CBRS, and mmWave bands.

Key questions addressed in this study:

- What is a smart warehouse and/or storage building? What applications and services are enabled in a warehouse and/or storage building?
- How has COVID-19 impacted the IBW market for warehouse and storage buildings?
- How much will be spent to build and operate sub 6 GHz, CBRS and mmWave IBW systems in U.S. warehouse and storage buildings from 2020 to 2025?
- What technologies are required for a smart warehouse and storage 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
- 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.