U.S. Outdoor Small Cells Forecast, 2021 – 2026

Later, not sooner

U.S. Outdoor Small Cells, 2021 – 2026: *Later, not sooner*

A Market Study

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Abstract

New outdoor small cells will absolutely be deployed. However, iGR believes for multiple reasons elucidated in this report, that the opportunity for outdoor small cells, particularly those deployed onto poles or similar sites, is lower than it was a year ago and delayed by at least 12 to 18 months.

Because of the impact of the COVID-19 pandemic and multiple other factors, iGR has reduced its forecast for the number of Sub 6 GHz and mmWave outdoor small cells to be installed in the U.S. throughout the forecast period (2021-2026).

In this market study, iGR presents a total addressable market forecast and an "actual" forecast for U.S. outdoor small cell nodes installed. This forecast only includes outdoor small cells used for mobile voice/data by the public networks; it excludes any deployments of fixed wireless access (FWA).

The assumptions underlying iGR's outdoor small cell forecasts are explained in this market study. The forecasts are further based on iGR's global connections forecast market study and iGR's mobile data forecast market study, as well as iGR's primary and secondary research, and various other sources.

Key questions addressed:

- What is an outdoor small cell? What are metrocells, RRHs and oDAS?
- Why do the mobile networks need outdoor small cells to meet bandwidth demand?
- How do outdoor small cells fit into operators' evolving networks?
- What are the issues with deploying outdoor small cells in the U.S.? How do these issues impact the number of small cells in the market?
- What is the effect of COVID-19 on outdoor small cell deployments?
- What is the regulatory environment for deploying small cells?
- Where are outdoor small cells most likely to be located? What's their role?
- How important is location to the effectiveness of an outdoor small cell?
- What is the total addressable market in the U.S. for outdoor small cells?
- How does the forecast for actual outdoor small cells deployments in the U.S. compare to the U.S. outdoor small cell total addressable market forecast?
- What are the market forecasts for sub-6 GHz cells, CBRS cells and mmWave small cells?

Who should read this report:

- Mobile operators
- Device OEMs
- Mobile infrastructure and equipment OEMs
- Content providers and distributors
- Financial analysts and investors.