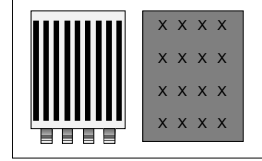




Wireless Market Intelligence Proprietary • Accurate • Cutting Edge

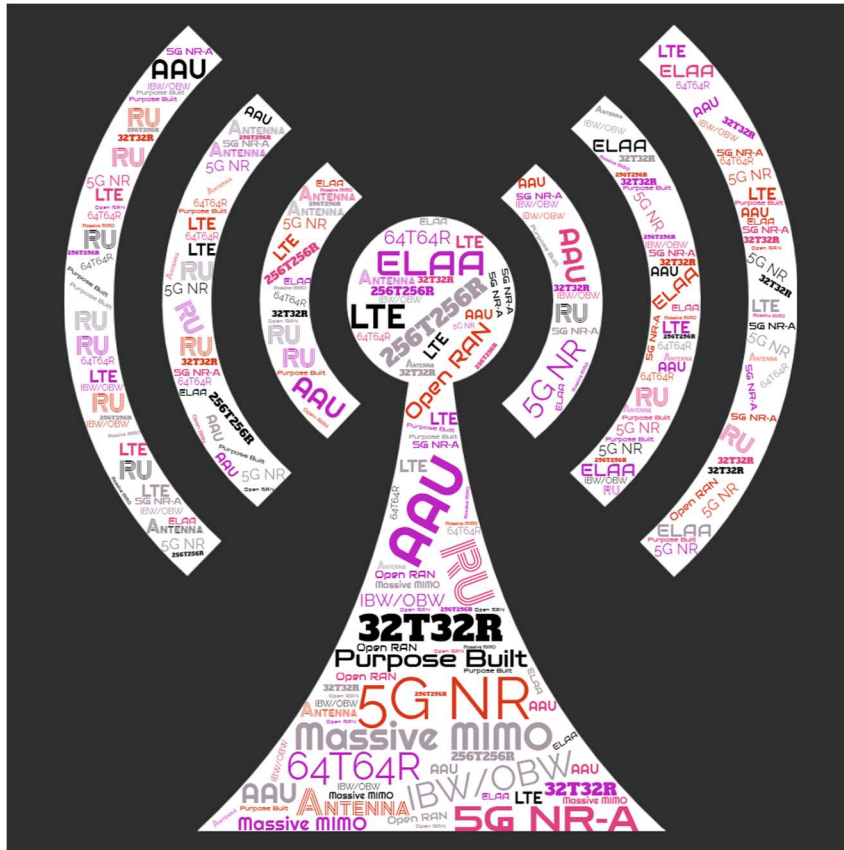
Earl J. Lum
+1-650-430-2221
elum@ejlwireless.com



5th Edition

Global Macrocell Radio Unit/Active Antenna Unit (RU/AAU) Vendor Market Share Analysis, 2021-2022

October 2023



Entire contents © 2023 EJL Wireless Research LLC. All Rights Reserved. Reproduction of this publication in any form without prior written permission is strictly forbidden and will be prosecuted to the full extent of US and International laws. The transfer of this publication in either paper or electronic form to unlicensed third parties is strictly forbidden. The information contained herein has been obtained from sources EJL Wireless Research LLC deems reliable. EJL Wireless Research disclaims all warranties as to the accuracy, completeness, or adequacy of such information. EJL Wireless Research LLC shall bear no liability for errors, omissions, or inadequacies in the information contained herein or for the interpretation thereof. The reader assumes sole responsibility for the selection of these materials to achieve their intended results. The opinions expressed herein are subject to change without notice.

TABLE OF CONTENTS

| | |
|---|----|
| EXECUTIVE SUMMARY | 5 |
| RESEARCH METHODOLOGY..... | 7 |
| CHAPTER 1: 2022 MARKET SHARE | 8 |
| Huawei is still the one, after all these years..... | 8 |
| Geographical Analysis - The “C” Factor | 9 |
| North America Region | 12 |
| Latin America Region | 13 |
| Europe Region | 14 |
| Africa Region | 15 |
| The Middle East Region | 16 |
| Rest of Asia Pacific Region..... | 17 |
| India Region | 18 |
| China Region | 19 |
| CHAPTER 2: RU/AAU VENDOR ANALYSIS | 20 |
| 2.1 Airspan Networks Holdings, Inc. | 21 |
| 2.2 CITIC Mobile Communications Equipment Co., Ltd. (China Information and Communication Technology Group) | 23 |
| 2.3 Comba Telecom Systems Holdings Ltd..... | 25 |
| 2.4 DKK Co., Ltd. | 27 |
| 2.5 Ericsson..... | 29 |
| 2.6 Fujitsu Ltd. | 33 |
| 2.7 Huawei Technologies..... | 35 |
| 2.8 Microelectronics Technology Inc. | 38 |
| 2.9 NEC Corporation | 40 |
| 2.10 Nokia Networks | 42 |
| 2.11 Samsung Networks | 46 |
| 2.12 Viettel High-Tech Industries Corporation | 49 |
| 2.13 ZTE Corporation | 51 |

TABLES

| | |
|--|----|
| Table 1: Global RU/AAU Market Share by Vendor, 2021-2022 (Units) | 5 |
| Table 2: Global RU/AAU Market Share by Vendor, 2021-2022 (Units) | 8 |
| Table 3: Global RU/AAU Market Share by Vendor, Chinese vs. ROW, 2021-2022 (Units) | 9 |
| Table 4: North America RU/AAU Shipments by Vendor, 2021-2022 (Units)..... | 12 |
| Table 5: Latin America RU/AAU Shipments by Vendor, 2021-2022 (Units)..... | 13 |
| Table 6: Europe RU/AAU Shipments by Vendor, 2021-2022 (Units)..... | 14 |
| Table 7: Africa RU/AAU Shipments by Vendor, 2021-2022 (Units)..... | 15 |
| Table 8: The Middle East RU/AAU Shipments by Vendor, 2021-2022 (Units)..... | 16 |
| Table 9: Rest of Asia Pacific RU/AAU Shipments by Vendor, 2021-2022 (Units) | 17 |
| Table 10: India RU/AAU Shipments by Vendor, 2021-2022 (Units) | 18 |
| Table 11: China RU/AAU Shipments by Vendor, 2021-2022 (Units) | 19 |
| Table 12: Airspan Networks RU/AAU Shipments by Region, 2021-2022 (Units)..... | 21 |
| Table 13: Airspan Networks RU/AAU Shipments by Type, 2021-2022 (Units)..... | 21 |
| Table 14: CITIC Mobile RU/AAU Shipments by Region, 2021-2022 (Units)..... | 23 |
| Table 15: CITIC Mobile RU/AAU Shipments by Type, 2021-2022 (Units) | 23 |
| Table 16: Comba Telecom RU/AAU Shipments by Region, 2021-2022 (Units)..... | 25 |
| Table 17: Comba Telecom RU/AAU Shipments by Type, 2021-2022 (Units)..... | 25 |
| Table 16: DKK Co., Ltd. RU/AAU Shipments by Region, 2021-2022 (Units) | 27 |
| Table 17: DKK Co., Ltd. RU/AAU Shipments by Type, 2021-2022 (Units) | 27 |
| Table 18: Ericsson RU/AAU Shipments by Region, 2021-2022 (Units)..... | 29 |
| Table 19: Ericsson RU/AAU Shipments by Type, 2021-2022 (Units)..... | 29 |
| Table 20: Ericsson Network Net Sales by Geographical Region, 2021-2022 (SEK Million) | 30 |
| Table 21: Fujitsu RU/AAU Shipments by Region, 2021-2022 (Units) | 33 |
| Table 22: Fujitsu RU/AAU Shipments by Type, 2021-2022 (Units)..... | 33 |
| Table 23: Huawei Technologies RU/AAU Shipments by Region, 2021-2022 (Units) | 35 |
| Table 24: Huawei Technologies RU/AAU Shipments by Type, 2021-2022 (Units)..... | 35 |
| Table 25: Huawei Technologies Net Sales by Customer Group, 2021-2022 (CNY Million)..... | 36 |
| Table 26: Huawei Technologies Net Sales by Industry Group, 2021-2022 (CNY Million)..... | 36 |
| Table 27: Huawei Technologies Net Sales by Geographical Region, 2021-2022 (CNY Million) | 37 |
| Table 28: MTI Technology RU/AAU Shipments by Region, 2021-2022 (Units) | 38 |
| Table 29: MTI Technology RU/AAU Shipments by Type, 2021-2022 (Units) | 38 |
| Table 28: NEC RU/AAU Shipments by Region, 2021-2022 (Units)..... | 40 |
| Table 29: NEC RU/AAU Shipments by Type, 2021-2022 (Units) | 40 |
| Table 30: Nokia RU/AAU Shipments by Region, 2021-2022 (Units) | 42 |
| Table 31: Nokia RU/AAU Shipments by Type, 2021-2022 (Units) | 42 |
| Table 32: Nokia Mobile Networks Net Sales by Geographical Region, 2021-2022 (EUR Million)..... | 43 |
| Table 35: Samsung Networks RU/AAU Shipments by Region, 2021-2022 (Units) | 46 |
| Table 36: Samsung Networks RU/AAU Shipments by Type, 2021-2022 (Units)..... | 46 |
| Table 37: Viettel High-Tech Industries RU/AAU Shipments by Region, 2021-2022 (Units) | 49 |
| Table 38: Viettel High-Tech Industries RU/AAU Shipments by Type, 2021-2022 (Units) | 49 |
| Table 39: ZTE RU/AAU Shipments by Region, 2021-2022 (Units) | 51 |
| Table 40: ZTE RU/AAU Shipments by Type, 2021-2022 (Units)..... | 51 |
| Table 41: ZTE Net Sales by Business Segment, 2021-2022 (CNY Million) | 52 |
| Table 42: ZTE Net Sales by Geographical Region, 2021-2022 (CNY Million) | 52 |

EXHIBITS

| | |
|---|----|
| Exhibit 1: Global RU/AAU Market Share by Vendor, 2022 (% Market Share)..... | 5 |
| Exhibit 2: Global RU/AAU Market Share by Vendor, 2022 (% Market Share)..... | 8 |
| Exhibit 3: Global RU/AAU Market Share by Vendor, Chinese vs. ROW, 2021-2022 (Units) | 9 |
| Exhibit 4: Historical China Region Market Share, 2015-2022 (% Market Share) | 10 |
| Exhibit 5: China RU/AAU Shipment Forecast, 2023-2027 (% Market Share) | 11 |
| Exhibit 6: North America RU/AAU Shipments by Vendor, 2021-2022 (Units)..... | 12 |
| Exhibit 7: Latin America RU/AAU Shipments by Vendor, 2021-2022 (Units)..... | 13 |
| Exhibit 8: Europe RU/AAU Shipments by Vendor, 2021-2022 (Units) | 14 |
| Exhibit 9: Africa RU/AAU Shipments by Vendor, 2021-2022 (Units)..... | 15 |
| Exhibit 10: The Middle East RU/AAU Units by Vendor, 2022 (% Market Share) | 16 |
| Exhibit 11: Rest of Asia Pacific RU/AAU Shipments by Vendor, 2021-2022 (Units)..... | 17 |
| Exhibit 12: India RU/AAU Shipments by Vendor, 2021-2022 (Units) | 18 |
| Exhibit 13: China RU/AAU Shipments by Vendor, 2021-2022 (Units) | 19 |
| Exhibit 14: Airspan Networks RU/AAU Shipments by Region (% Market Share)..... | 22 |
| Exhibit 15: CITIC Mobile RU/AAU Shipments by Region (% Market Share) | 24 |
| Exhibit 16: Comba Telecom RU/AAU Shipments by Region (% Market Share)..... | 26 |
| Exhibit 16: DKK Co., Ltd. RU/AAU Shipments by Region (% Market Share) | 28 |
| Exhibit 17: Ericsson RU/AAU Shipments by Region (% Market Share)..... | 30 |
| Exhibit 18: Ericsson Network Net Sales, Products vs. Services, Q1 2021-Q4 2022 (SEK Million)..... | 31 |
| Exhibit 19: Fujitsu RU/AAU Shipments by Region, 2022 (% Market Share)..... | 34 |
| Exhibit 20: Huawei Technologies RU/AAU Shipments by Region, 2022 (% Market Share) | 36 |
| Exhibit 21: NEC RU/AAU Shipments by Region, 2022 (% Market Share) | 41 |
| Exhibit 22: Nokia RU/AAU Shipments by Region, 2022 (% Market Share) | 43 |
| Exhibit 23: Nokia Mobile Networks Net Sales, Q1 2021-Q4 2022 (EUR Million)..... | 44 |
| Exhibit 24: Samsung Networks RU/AAU Shipments by Region, 2022 (% Market Share) | 47 |
| Exhibit 25: Samsung Networks Revenues, Q1 2021-Q4 2022 (KRW Trillion)..... | 47 |
| Exhibit 26: Viettel High-Tech Industries RU/AAU Shipments by Region, 2022 (% Market Share) | 50 |
| Exhibit 27: ZTE RU/AAU Shipments by Region, 2022 (% Market Share)..... | 52 |