

**5G NTN Market by Component (Hardware, Solutions, Services), End-Use Industry (Maritime, Aerospace and Defense, Government, Mining), Application (EMBB, URLLC, and MMTC), & Region (North America, Europe, APAC, MEA, Latin America) - Global Forecast to 2027**

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**Report description:**

The 5G NTN market is projected to grow from USD 3.2 billion in 2022 to USD 16.1 billion by 2027, at a CAGR of 38.2% during the forecast period. Mining companies are implementing the latest automation technologies to improve their operations. For instance, Boliden, a Swedish mine operator, partnered with Ericsson to build an autonomous gold mine where Ericsson installed the 5G network at the mining site, and also the increasing need to support vessels with high data rates for applications, such as video and data file transfer, is driving the demand for 5G NTN solutions.

By platform, LEO satellite to register higher CAGR during the forecast period

LEO is emerging as a preferred solution to develop a 5G NTN system to enhance network coverage and offer ample opportunities to bridge the connectivity divide. Countries in the Middle East & Africa, such as Saudi Arabia and Abu Dhabi, are leveraging the capabilities of LEO technology to their vision for 2030.

Governments in various countries are also supporting the expansion of network coverage by integrating the terrestrial network with LEO satellite to build a 5G NTN system. In July 2019, the Government of Canada and Telesat signed a deal of USD 600 million to reduce the connectivity gap across Canada with the LEO satellite constellation of Telesat. In August 2022, MediaTek and Rohde & Schwarz collaborated to demonstrate the capabilities of 5G NTN to provide more reliable and fast connectivity by executing a NodeB network (gNB) test over an LEO satellite. The company has achieved a new 5G milestone by powering a smartphone with a 5G NTN connection for the first time.

By application, eMBB to account for the largest market share during the forecast period

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5G NTN focused on the deployment of eMBB to provide high bandwidth with moderate latency, support high mobility of approximately 500 Kmph, and handle 10,000 times more traffic. There are a few use cases mentioned in release-18 related to eMBB, which include mobility enhancement, MIMO, and network power saving. Various leading players are adopting enhanced mobile broadband to offer 5G network connectivity similar to LTE services. With 5G NTN, eMBB services provide excellent broadband connectivity in rural and under-served areas on moving platforms, such as aircraft and vessels.

Asia Pacific to register the highest CAGR during the forecast period

The growth of the 5G NTN market in the Asia Pacific is highly driven by the existence of a large population, developing infrastructure and technology. The need to improve public safety in disaster and other emergency situations is also a major driver to adoption of 5G NTN solutions in this region. The region is witnessing a surge in smart infrastructures, such as smart city projects, creating a greater demand for public safety and security technologies such as surveillance systems, scanning and screening systems, and critical communication networks. Various industries such as aerospace, maritime, defense, and others are adopting integrated 5G network and satellite-based solutions to enhance network coverage in diverse locations. In the marine industry, maritime satellite technology has been adopted to leverage advanced communication networks to establish communication with employees working at remote offshore locations.

Breakdown of primaries

In-depth interviews were conducted with Chief Executive Officers (CEOs), innovation and technology directors, system integrators, and executives from various key organizations operating in the 5G NTN market.

- By Company Type: Tier I: 25%, Tier II: 35%, and Tier III: 40%

- By Designation: C-Level Executives: 60%, and Managers: 40%

- By Region: North America: 30%, Europe: 35%, Asia Pacific: 25%, Middle East & Africa: 5%, and Latin America: 5%

The report includes the study of key players offering 5G NTN hardware, solutions, and services. It profiles major vendors in the 5G NTN market. The major vendors in the 5G NTN market include Qualcomm Technologies, Inc (US), Gilat Satellite Networks (Israel), SoftBank Group Corporation (Japan), Thales Group (France), Thales Alenia Space (France), Rohde & Schwarz GmbH & Co KG (Germany), Keysight Technologies, Inc (US), MediaTek Inc. (Taiwan), Anritsu Corporation (Japan), SES S.A. (Luxembourg), EchoStar Corporation (EchoStar) (US), SpaceX (US), AST & Science, LLC (US), ZTE Corporation (China), OneWeb (UK), GateHouse SatCom A/S (Denmark), Omnispace, LLC (US), Nelco Limited (US), Inmarsat Global Limited (UK), Skylo Technologies (US), Globalstar, Inc (US), Spirent Communications (Spirent) (UK), Telefonaktiebolaget LM Ericsson (Sweden), Nokia Corporation (Finland), Intelsat US LLC (US), and Telefonica S.A. (Spain), Viasat Inc, (US), Telesat (Canada).

Research Coverage

The market study covers the 5G NTN market across segments. It aims at estimating the market size and the growth potential of this market across different segments, such as by component, platform, application, end-use industry, location, and region. It includes an in-depth competitive analysis of the key players in the market, along with their company profiles, key observations related to product and business offerings, recent developments, and key market strategies.

Key Benefits of Buying the Report

The report would provide the market leaders/new entrants in this market with information on the closest approximations of the revenue numbers for the overall 5G NTN market and its subsegments. It would help stakeholders understand the competitive landscape and gain more insights better to position their business and plan suitable go-to-market strategies. It also helps stakeholders understand the pulse of the market and provides them with information on key market drivers, restraints, challenges, and opportunities.

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\*Details on Business Overview, Solutions, Products & Services offered, Recent Developments, MnM View might not be captured in case of unlisted companies.

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