

Malaysia Telecom - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts 2019 - 2029

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Report description:

The Malaysia Telecom Market size is estimated at USD 8.33 billion in 2024, and is expected to reach USD 9.07 billion by 2029, growing at a CAGR of 1.72% during the forecast period (2024-2029).

Most major telecom companies, such as Edotco, Sacofa Sdn Bhd, Digi telecommunication, Maxis, and Celcom, are based in Malaysia and promote innovation by making significant R&D investments consistently.

Key Highlights

- Malaysia's telecom industry has made further strides in expanding its services that support the 5G network. For Instance, In October this year - Digi signed an Access Agreement (AA) with DNB (Digital Nasional Berhad) for access to Malaysia's 5G Single Wholesale Network (SWN). This agreement will enable the company to enrich its current portfolio of services with the gradual deployment of 5G retail services for consumers and enterprise customers. Such initiatives will increase the demand for reliable and high-speed internet connectivity services.
- For instance, In April this year, Celcom and HeiTech signed a memorandum of understanding (MOU) to explore the use of smart healthcare technologies and services in Malaysian ambulances. With the help of Celcom's 4G LTE coverage and high-speed connectivity network services, emergency medical teams on the ground or traveling to hospitals can evaluate and transmit data to medical staff. They will use real-time video feeds for better preparation before the ambulance arrives. Such initiatives across the adoption of Wi-Fi solutions will bring growth opportunities for the telecom market.
- Fiber broadband penetration will grow over the next five years, driven by the efforts from the operators and the government to expand fiber broadband coverage across the country. For Instance, In December, Telekom Malaysia signed a fiber leasing service agreement with state-owned wholesale 5G network operator Digital Nasional Berhad (DNB) to speed up the deployment of the 5G network across the country. TM agreement had a total contract value of USD 474 million over ten years. Through this deal, TM will

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provide DNB with 5G fiber leasing services for connectivity between DNB's 5G mobile sites and nodes, leveraging on TM's domestic fiber cable network, which spans more than 640,000 km throughout Malaysia.

-Deployment of wireless access to remote locations will help accelerate digitalization and 5G deployment in the country. For instance, edotco proactively engaged with other Malaysian telecom operators to roll out a 5G network across the country.

-During COVID-19, the telecom industry has shown sustainable growth in deploying the 5G network. During the coming year, the telecoms sector will likely experience an increase in the adoption of the 5G network. It may also be difficult for network operators to manage workflows when maintaining and upgrading existing infrastructure. Overall progress toward the 5G network will positively impact the market's growth.

Malaysia Telecom Market Trends

Growing demand for Wireless Services

- Fiber-to-the-home/building (FTTH/B) service will remain the dominant broadband service category. The increase in wireless broadband services will drive the telecom market growth positively. Also, key players in the telecom market are expanding their wireless broadband network capacity to 5G networks. For Instance, Telekom Malaysia plans to extend its broadband network coverage from 3G and 4G to 5G networks.

- The government of Malaysia announced a multi-billion dollar national digital infrastructure plan, Jalanan Digital Negara (JENDELA), to improve the country's digital infrastructure and connectivity. As a part of this approach, the initiative will strengthen existing 4G networks and establish a solid foundation for 5G. The JENDELA plans to build full-fiber networks for homes, businesses, and government buildings covering 98% of the population by the end of 2025, as well as providing 100% 4G coverage with a minimum speed of 100 Mbps.

- The wireless broadband market is now experiencing substantial growth driven primarily by developments made by key players in the market, namely TIME, Celcom, Maxis, and DiGi, with Telekom Malaysia. For Instance, this year- Celcom introduced its free fiber connectivity for Malaysian at a special price of RM 245 per month.

- During the COVID-19 pandemic and post-COVID-19 scenario, most people preferred work-from-home mode, thus creating more demand for wireless services. These fixed broadband services can provide high-speed internet services. Key players in the market are now concentrating on expanding their broadband services that support 5G networks.

Growing demand for OTT Services

- The covid-19 pandemic has accelerated the trend for people to opt for entertainment at home and thus increased the active usage of OTT streaming services.

- Active collaboration with telecom industry players will bring new growth opportunities for OTT service providers. For Instance, In September 2022, aha, one of India's leading regional language OTT (Over-the-top) platforms, launched in Malaysia with a robust content offering for the local Tamil diaspora. Such new initiatives across OTT service providers will further help grow the market.

- Astro Malaysia Holdings Bhd is working to become the number one streaming service aggregator in Malaysia with Astro Go, Disney+ Hotstar, Netflix, TVBAnywhere+, HBO Go, and iQiyi available on its platform, with plans to onboard six more channels by the end of 2023. OTT services providers look for opportunities to strengthen their digital, broadband, and commerce businesses.

- The increasing internet penetration will significantly increase the demand for OTT services. According to the Digital 2022 report, there were 29.55 million internet users in Malaysia till January 2022. Malaysia's internet penetration will be 89.6% of the total population by the end of 2022.

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Malaysia Telecom Industry Overview

The Malaysia telecom market is moderately fragmented due to ongoing partnerships and current advancements in the market. Some major players in the market studied included Edotco, Sacofa Sdn Bhd, Digi telecommunication, Maxis, and Celcom.

November 2022 - Huawei Malaysia received the Special Award recognition for the company's contribution to 5G Cybersecurity Development in Malaysia. Huawei collaborated with telecommunications Celcom to develop the country's digital transformation and 5G cybersecurity development.

March 2022 - Telekom Malaysia announced that it no longer accepts new registrations for its copper-based broadband services. Further, Telekom Malaysia also confirmed that it intends to migrate all Streamyx and Business Broadband customers to a fiber-based service by the end of 2025.

Additional Benefits:

- The market estimate (ME) sheet in Excel format
- 3 months of analyst support

Table of Contents:

1 INTRODUCTION

- 1.1 Study Assumptions and Market Definition
- 1.2 Scope of the Study

2 RESEARCH METHODOLOGY

3 EXECUTIVE SUMMARY

4 MARKET INSIGHTS

- 4.1 Market Overview
- 4.2 Industry Ecosystem Analysis
- 4.3 Industry Attractiveness-Porter's Five Force Analysis
 - 4.3.1 Bargaining Power of Suppliers
 - 4.3.2 Bargaining Power of Consumers
 - 4.3.3 Threat of New Entrants
 - 4.3.4 Threat of Substitute Products
 - 4.3.5 Intensity of Competitive Rivalry
- 4.4 COVID-19 Impact on the Industry Ecosystem
- 4.5 Regulatory Landscape in the Malasiya

5 MARKET DYNAMICS

- 5.1 Market Drivers
 - 5.1.1 Rising demand for 5G
 - 5.1.2 Growth of IoT usage in Telecom
- 5.2 Market Restrain
 - 5.2.1 The emergence of stiff competition is a concern for the industry
- 5.3 Analysis of the Market based on Connectivity (Coverage to include In-depth Trend Analysis)

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5.3.1 Fixed Network

5.3.1.1 Broadband (Cable modem, wireline-fiber, wireline DSL, fixed Wi-Fi), Trends regarding ADSL/VDSL, FTTP/B, cable modem, FWA, and 5G FWA)

5.3.1.2 Narrowband

5.3.2 Mobile Network

5.3.2.1 Smartphone and mobile penetration

5.3.2.2 Mobile Broadband

5.3.2.3 2G, 3G, 4G and 5G connections

5.3.2.4 Smart Home IoT and M2M connections

5.4 Analysis of Telecom Towers (Coverage to include in-depth trend analysis of various types of towers, like, lattice, guyed, monopole, and stealth towers)

6 MARKET SEGMENTATION

6.1 By Services

6.1.1 Voice Services

6.1.1.1 Wired

6.1.1.2 Wireless

6.1.2 Data and Messaging Services (Coverage to include Internet & Handset Data packages, Package Discounts)

6.1.3 OTT and PayTV Services

7 COMPETITIVE LANDSCAPE

7.1 Company Profiles

7.1.1 Edotco

7.1.2 Sacofa Sdn Bhd

7.1.3 Digi telecommunication

7.1.4 Maxis

7.1.5 Celcom

7.1.6 U Mobile

7.1.7 Telekom Malaysia

7.1.8 AT&T

7.1.9 Time dotCom

7.1.10 BT

8 INVESTMENT ANALYSIS

9 FUTURE OUTLOOK OF THE MARKET

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