

Satellite Communication (SATCOM) Equipment Market by Solution (Product (Antennas, Transceivers, Power Amplifiers, Converters), Service (Engineering)), Platform, Type, Vertical, Frequency, Connectivity, and Region- Global Forecast to 2029

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Report description:

The SATCOM equipment market is valued at USD 24.27 billion in 2024 and is projected to reach USD 41.51 billion by 2029, at a CAGR of 11.3% from 2024 to 2029. SATCOM has witnessed significant development in the last two-three years, both in the arena of technological advancement as well as the changing nature of market demand. For instance, LEO constellations have revolutionized connectivity with lower latency and more bandwidth. High throughput satellites and phased array antennas have revolutionized data transmissions as well as the end user experience.

Satellites provide a host of voice, data, and broadcast solutions that wouldn't have been possible in the 20th century. This convergence drives increased network demands to deliver uninterrupted availability, reliability, and security. And, as more mission-critical applications become dependent on the network, tolerance for network problems approaches zero. The increasing demand for broadband connectivity, extension of coverage by cellular networks, the need for IoT connectivity, and increasing government investment in satellite communication-related infrastructure drive the market. In total, these factors make more sophisticated satcom equipment to work at multiple frequency bands, have higher data rates, efficiency, and reliability appealing to customers. HTS will change the satcom equipment market to significantly higher data rates and capacity, revolutionizing the technology as applied to traditional satellites. It uses spot beams that concentrate bandwidth over particular geographic areas for delivering broad applications and services, from broadband internet to video streaming and enterprise networks.

Satcom equipment integrated with terrestrial networks, such as 5G and 6G, is another notable market trend. Integration will enhance seamless connectivity, with a much more resilient network by exploiting both strengths in satellite and terrestrial

communications. Top companies in the satcom equipment market invest a lot in R&D to innovate the most advanced technologies like GaAs and Gallium RF technology to enhance performance efficiency and reliability. The top players are also scouting for strategic partnerships and collaborations to capitalize on this opportunity and provide solutions which meet the requirements of the customers.

"Based on frequency, the multiband frequency is projected to register the highest during the forecast period 2024-2029." Based on frequency, the SATCOM equipment market has been segmented into C band, L&S band, X band, Ka band, Ku band, VHF/UHF band, EHF/SHF band, Multiband, and Q band. Based on frequency, the multiband frequency is projected to register the highest CAGR during the forecast period 2024-2029. Multi-band frequency is being increasingly used due to the need for seamless, assured connectivity between the network and grid.

"Based on connectivity, MEO/GEO orbit segment is to lead the market during the forecast period 2024-2029."

The SATCOM equipment market has been segmented based on connectivity into LEO and MEO/GEO orbit. MEO/GEO orbit segment to lead the market during the forecast period 2024-2029. MEO high throughput satellites are challenging GEO satellites in cost per bit and overall operational efficiency. Several advantages, including the low manufacturing cost of smaller satellites used in prominent constellations, provide a viable commercial option for large GEO satellites for communication. Moreover, closer positioning to Earth's surface makes these satellites effective in the coverage of data connections. In February 2023, Marlink was awarded a Public Service Delegation contract to deploy broadband Internet and 4G/5G services via satellite networks, covering both urban and rural areas in French Guiana. In a 15-year agreement, Marlink and SES will leverage SES's multi-orbit geostationary (GEO) and Medium Earth Orbit (MEO) satellite network to provide high-speed services to over 30,000 users across the French region.

"The North American market is projected to contribute the most significant share from 2024 to 2029 in the SATCOM equipment market."

North America is projected to dominate the SATCOM equipment market from 2024 to 2029 by region. The North American segment, particularly the US, possesses a highly rewarding demand for SATCOM equipment. The US government has been continually investing in SATCOM with the intention of improving the quality and efficiency of satellite communication. The increasing investment in SATCOM equipment is mainly for upgrading the defense and surveillance of the armed forces, improving the modernization of military platforms' communication systems, and supporting critical infrastructure and law enforcement agencies. Such factors are significantly responsible for the growth of the North American SATCOM equipment market. Some of the notable players from this region are L3Harris Technologies (US), Honeywell International Inc. (US), EchoStar Corporation (US), Viasat, Inc. (US), and so on. Prominent players from this region include L3Harris Technologies (US), Honeywell International Inc. (US), Honeywell International Inc. (US), EchoStar Corporation (US), Viasat, Inc. (US), EchoStar Corporation (US), and others.

The break-up of the profile of primary participants in the SATCOM equipment market:

- By Company Type: Tier 1 - 49%, Tier 2 - 37%, and Tier 3 - 14%

- By Designation: C Level 55%, Managers 27%, and Others 18%
- By Region: North America 32%, Europe 32%, Asia Pacific 16%, Middle East & Africa 10%, Latin America 10%

Major companies profiled in the report include Echostar Corporation (US), L3Harris Technologies, Inc. (US), Thales (France), RTX (US), General Dynamics Corporation (US), Cobham Satcom (Denmark), Honeywell International Inc. (US), Viasat, Inc. (US), Gilat Satellite Networks (Israel), Aselsan A.S (Turkey), Iridium Communication Inc. (US), Intellian Technologies Inc. (South Korea), ST Engineering (Singapore), SpaceX (US), Elbit Systems Ltd. (Israel), Campbell Scientific, Inc. (US), among others.

Research Coverage:

This market study covers the SATCOM equipment market across various segments and subsegments. It aims to estimate this market's size and growth potential across different parts based on Solutions (Products, Services) Verticals (Commercial, Government & Defense), Type (SATCOM-on-the-Move, SATCOM-on-the-Pause), Connectivity (LEO, MEO/GEO), Frequency (C-Band, L&S-Band, X-Band, Ka-Band, Ku-Band, VHF/UHF-Band, EHF/SHF-Band, Multi-Band, Q-Band), Platform(Portable, Land Fixed, land

Mobile, Maritime, Airborne) and Region (North America, Europe, Asia Pacific, Middle East & Africa, Latin America). This study also includes an in-depth competitive analysis of the key players in the market, their company profiles, key observations related to their product and business offerings, recent developments, and key market strategies they adopted. Reasons to buy this report:

The report will help the market leaders/new entrants with information on the closest approximations of the revenue numbers for the overall SATCOM equipment market. This report will help stakeholders understand the competitive landscape and gain more insights to position their businesses better and plan suitable go-to-market strategies. The report also helps stakeholders understand the market pulse and provides information on key market Drivers (Large-scale adoption of electronically steered phased antennas Increased LEO Satellite launches,Integration of SOTM solutions into unmanned ground vehicles, Need for Earth observation imagery and analytics, Surge in demand for high-speed data and voice services from aviation and maritime sectors, Growing preference for connected devices and IoT)

, Restraints (High development and maintenance cost of SATCOM infrastructure, Stringent government regulations and policies), Challenges (Need for high-speed, reliable communications networks in remote locations, Rapid adoption of cloud-based services ,Development of ultra-compact SATCOM terminals for ground combat vehicles, Extensive use of portable SATCOM terminals by retail consumers, Deployment of SATCOM systems in healthcare and emergency response sectors), and opportunities (Electromagnetic compatibility-related challenges associated with satellites, Threat of cybersecurity attacks). The growth of the market can be attributed to the increasing launch of low earth orbit (LEO) satellites and constellations of satellites for communications applications, increasing usage of ESPA Antenna, and Increasing demand for customized SATCOM-on-the-Move solutions for unmanned ground vehicles.

The report provides insights on the following pointers:

Rising demand for SATCOM equipment in commercial aviation drive the market.

- Market Penetration: Comprehensive information on SATCOM equipment offered by the top players in the market

- Product Development/Innovation: Detailed insights on upcoming technologies, research & development activities, and new product launches in the SATCOM equipment market

- Market Development: Comprehensive information about lucrative markets - the report analyses the SATCOM equipment market across varied regions

- Market Diversification: Exhaustive information about new products, untapped geographies, recent developments, and investments in the SATCOM equipment market

- Competitive Assessment: In-depth assessment of market shares, growth strategies, products, and manufacturing capabilities of leading players in the SATCOM equipment market

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