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Hybrid Cellular/Non-Terrestrial Network (NTN) IoT Market - A Global and Regional Analysis: Focus on Product, Application, and Region - Analysis and Forecast, 2025-2035

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Abstracts

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This report will be delivered in 7-10 working days.Introduction to the Global Hybrid Cellular (NTN) IoT Market (Including Market in 2024 and 2035)

The Global Hybrid Cellular (NTN) IoT Market is on an accelerated growth trajectory as businesses and governments look to extend reliable connectivity beyond traditional terrestrial infrastructures. In 2024, market interest is primarily fueled by the expansion of remote monitoring applications, where standard cellular coverage is limited or nonexistent. By integrating non-terrestrial networks such as low Earth orbit (LEO) or geostationary orbit (GEO) satellites organizations can ensure seamless IoT data transmission over great distances, including maritime regions and rural sites lacking robust terrestrial coverage.

By 2035, the confluence of 5G deployments and large-scale satellite constellations is poised to reshape connectivity paradigms. With enhanced bandwidth, lower latency, and more affordable satellite access, previously inaccessible IoT use cases ranging from agricultural sensor networks to oceanic asset tracking will become viable. Moreover, ongoing standardization efforts by international bodies (e.g., 3GPP) and hardware cost reductions should further catalyze mass adoption of hybrid connectivity solutions. The result is expected to be a more globally interconnected IoT ecosystem, reaching underserved markets and revolutionizing data-driven operations on land, sea, and air.

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Regional Analysis

North America currently leads in hybrid cellular/NTN IoT implementation, driven by strong satellite infrastructure, early 5G rollouts, and advanced IoT ecosystems. Telecommunications providers in the U.S. and Canada partner with satellite operators to deliver end-to-end coverage, particularly for energy, agriculture, and UAV-based applications.

In Europe, robust regulatory support and significant R&D investments spur rapid adoption of combined satellite-cellular solutions. Operators in France, the U.K., and Germany leverage existing high-tech industries and a tech-savvy market to deploy IoT platforms for logistics, maritime navigation, and precision farming.

Meanwhile, Asia-Pacific displays high growth potential, with countries like China, Japan, and South Korea heavily funding satellite constellations and 5G. Rural connectivity and infrastructure projects also drive interest in hybrid solutions for large-scale agricultural monitoring and industrial operations.

Emerging markets in the Rest-of-the-World (particularly parts of Africa and Latin America) benefit from satellite IoT to overcome gaps in terrestrial coverage. Government-backed digitalization initiatives enhance the demand for reliable, wide-area connectivity, making hybrid cellular/NTN networks integral to bridging the digital divide.

Segments in the Global Hybrid Cellular/Non-Terrestrial Network (NTN) IoT Market

By Application

UAVs Tracking and Monitoring

Sea Asset Tracking

Infrastructure Monitoring

Agriculture

Others

By Product

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By IoT Protocol

NB-IoT

LTE-M

5G-NR and 5G mMTC

LoRaWAN and LPWAN

By Component

Device

Gateways

Terminals

Others

Network

By Region

North America

Europe

Asia-Pacific

Rest-of-the-World

Trend in the Market

An important trend is the standardization of satellite-based IoT protocols to interoperate seamlessly with terrestrial networks. Organizations like 3GPP are actively defining specifications (for example, 5G NR Release 17) that incorporate satellite links. This

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allows devices designed for LTE-M or NB-IoT to connect over non-terrestrial networks with minimal modifications, simplifying global deployments. Parallel to this, hardware vendors are rolling out multimode chipsets capable of automatically switching between satellite and terrestrial connections. This push toward unified standards expedites development cycles, reduces complexity, and accelerates market adoption by making hybrid connectivity more cost-effective and user-friendly.

Driver in the Market

A driving force behind this market's growth is the demand for ubiquitous coverage to support remote or mission-critical IoT applications. Industries such as maritime shipping, oil and gas, and large-scale agriculture require reliable data communication in areas where terrestrial networks fail or are too expensive to build. By integrating satellite connectivity, organizations can track assets, monitor environmental conditions, and support automated systems in locations without conventional cellular service. As a result, enterprises seeking to safeguard operations and optimize supply chains increasingly embrace hybrid solutions that ensure non-stop, real-time data transfer worldwide.

Restraint in the Market

Despite the market's expansion, high initial costs and complexity continue to hamper the full-scale deployment of hybrid cellular/NTN IoT systems. Satellite bandwidth, specialized hardware, and subscription fees can be prohibitively expensive for smaller businesses or cost-sensitive sectors. Additionally, configuring devices and gateways to handle different protocols and frequency bands may require specialized skills and extended testing periods. These factors can delay adoption, especially in regions or industries operating on tight margins, where a clear return on investment must be demonstrated before committing to new infrastructure.

Opportunity in the Market

Emerging use cases for UAVs, remote sensing, and disaster response offer a notable growth opportunity. Hybrid connectivity greatly enhances operations in areas prone to natural disasters satellite links remain operational even if ground-based networks are compromised. Drones equipped with satellite-based IoT modules can provide crucial real-time data for search and rescue, infrastructure assessments, and environmental monitoring. As governments and relief agencies recognize the value of such integrated solutions, funding and collaboration opportunities are expected to grow. Vendors

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capable of delivering rugged, scalable systems that support both terrestrial and satellite links will be well-positioned to capitalize on this rapidly developing segment.

Some of the prominent names in this market are:

Thales Group

Sateliot

Skylo

Inmarsat

Hiber

Globalstar

Sony Altair

INELTEK LTD.

Murata

Semtech

Orbcomm

Astrocast

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