

Maritime Satellite Market - A Global and Regional Analysis, 2023-2033: Focus on End User, Service, Solution, and Country-Wise Analysis

<https://marketpublishers.com/r/M485529976D6EN.html>

Date: April 2024

Pages: 133

Price: US\$ 4,950.00 (Single User License)

ID: M485529976D6EN

Abstracts

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Introduction of Maritime Satellite

Maritime satellites are a subset of the satellite communication business developed to satisfy the specific needs of nautical activities throughout the world's oceans and seas. These satellites offer critical services such as high-speed internet access, phone and data transmission, navigation, and safety features to vessels ranging from commercial cargo ships and cruise liners to private yachts and navy forces. Maritime satellites improve operational efficiency, safety, and regulatory compliance for the maritime industry by providing dependable connections in even the most distant marine zones. As the foundation of contemporary marine communication, these satellites are vital to the global economy, supporting international trade, simplifying rescue operations, and allowing the digital transformation of maritime sectors in an increasingly connected world.

Market Introduction

In the early days of maritime satellites, communication at sea was restricted, relying mainly on radio telephony and telex, which were sometimes unreliable and limited by range and weather. The marine satellite market dates back to 1965, when the first commercial communication satellite, Intelsat I (Early Bird), was launched, and the International Maritime Satellite Organization (INMARSAT) was established in 1979. These advances constituted a historic turning point in the maritime industry, allowing

ships to communicate with land and other vessels across long distances, boosting navigation, safety, and operating efficiency at sea.

Maritime satellites have progressed drastically over time, from bulky and inefficient systems in the beginning to today's small, high-throughput, and extremely dependable systems. Significant technological advancements have occurred during this evolution, including the transition from analog to digital technology, the introduction of geostationary Earth orbit (GEO) satellites for greater coverage, and the development of low Earth orbit (LEO) and medium Earth orbit (MEO) constellations for reduced latency and increased bandwidth. Innovations such as the Global Maritime Distress and Safety System (GMDSS), automatic identification system (AIS), and broadband satellite communications have transformed maritime operations, allowing for real-time data exchange, improved vessel tracking, and improved crew welfare and connectivity.

Industrial Impact

The introduction and adoption of maritime satellite technology has substantially revolutionized the marine sector, ushering in a new era of unprecedented connection and operational efficiency on the high seas. Maritime satellites have enabled real-time communication and data interchange between ships and shore-based operations, significantly altering how shipping companies manage their fleets, plan routes, and respond to emergencies. This improved connectivity not only increases navigational safety but also allows for the optimization of fuel use and cargo management, resulting in more sustainable and cost-effective operations. Furthermore, satellite communications have become critical for meeting regulatory requirements such as the Global Maritime Distress and Safety System (GMDSS), which ensures that vessels can respond swiftly and efficiently to crises.

Furthermore, beyond operational efficiency, maritime satellites have had a significant influence on crew wellbeing and onboard entertainment. Crew members may use high-speed internet, satellite TV, and phone services to remain in touch with their family and enjoy entertainment throughout long trips, considerably boosting their quality of life at sea. Furthermore, receiving real-time weather information and navigational alerts has improved the safety and efficiency of marine operations. As the marine sector moves toward digitization and autonomous shipping, the function of maritime satellites will become ever more important. Continuous advancements in satellite technology, such as higher bandwidth capacities and lower latency networks, promise to drive further innovations in maritime logistics, safety, and environmental stewardship, highlighting the maritime satellite market's critical role in the future of global shipping and marine

exploration.

Market Segmentation:

Segmentation 1: by End User

Merchant Shipping

Fishing

Passenger Ship

Offshore

Government

Others

Merchant Shipping to Dominate the Global Maritime Satellite Market (by End User)

The maritime satellite market is led by the merchant shipping segment, with a 39.49% share in 2022. This is because they enable dependable global communication and data transmission capabilities across enormous expanses of the ocean. These technologies keep vessels in continual touch with shore-based operations, which improves navigational safety, operational efficiency, and regulatory compliance.

Segmentation 2: by Service

Tracking and Monitoring

Voice

Video

Data

Tracking and Monitoring Segment to Witness the Highest Growth between 2023 and

2033

The tracking and monitoring segment dominated the global maritime satellite market (by service) in 2022, with a 41.15% share, since maritime satellites provide constant, worldwide coverage, which is required for real-time vessel tracking and marine environmental monitoring. This capacity improves ship safety and security in international seas, allowing for more quick responses to crises and pirate concerns.

Segmentation 3: by Solution

Very Small Aperture Terminal (VSAT)

Mobile Satellite Service (MSS)

Very Small Aperture Terminal (VSAT) Segment to Witness the Highest Growth between 2023 and 2033

The very small aperture terminal (VSAT) segment dominated the global maritime satellite market (by solution) in 2022, with a 33% share. This is because VSAT systems offer the high-speed broadband connectivity required for contemporary marine operations, such as real-time navigation, streaming data, and high-speed internet access for crew and passengers. This degree of connectedness is critical for operating efficiency, safety, and personnel wellbeing on board ships.

Segmentation 4: by Region

North America - U.S. and Canada

Europe - U.K., Germany, France, Russia, and Rest-of-Europe

Asia-Pacific - China, India, Japan, and Rest-of-Asia-Pacific

Rest-of-the-World - South America and Middle East and Africa

Asia-Pacific was the highest-growing market among all the regions, registering a CAGR of 10.19% during the forecast period 2023-2033. Europe is anticipated to gain traction in terms of maritime satellite adoption owing to the growth in maritime commerce as well

as the increasing demand for maritime connectivity.

In Europe, Rest-of-Europe is anticipated to show the highest growth in the maritime satellite market among other countries in the region, growing at a CAGR of 8.15% during 2023-2033. The growth of Rest-of-Europe in the maritime satellite market is mainly due to the fact that it benefits from extensive government support, well-developed research facilities, and innovative companies and start-ups.

Recent Developments in the Global Maritime Satellite Market

In January 2024, Singtel added Starlink's LEO satellite broadband connectivity service to assist its maritime customers. This would promote the adoption of digital solutions by vessel owners and commercial ship operators to adopt such technologies and would help the company introduce more technologies such as artificial intelligence (AI), 5G, and edge computing for their end users.

In March 2024, Iceye, a company that manufactures and manages a constellation of microsatellites equipped with synthetic aperture radar (SAR) sensors, introduced Ocean Vision, a new marine surveillance product. The service is intended to offer extensive monitoring of the world's seas.

In November 2023, Sateliot, the first company to operate a low-Earth orbit (LEO) 5G IoT satellite constellation, and t42, the global player providing IoT tracking devices for maritime containers, signed a collaboration agreement to increase connected containers, allowing shipping companies to save \$50.86 billion (47 billion euros) per year. t42 would deploy thousands of 5G-IoT sensors in containers for its more than 50 logistics partners in over fifty countries, linking them to Sateliot's satellites and solving the issue of lack of coverage on the high seas.

Demand – Driver, Restraint, Opportunity

Market Demand Driver: Enhanced Maritime Communication Needs

The growing reliance on data-intensive applications on ships, such as real-time navigation, weather forecasting, and streaming video for crew wellbeing, necessitates high data rate communications. To fulfill these needs, maritime satellite operators are installing high-throughput satellites and developing new technologies, such as LEO

satellite constellations, which give increased bandwidth and quicker transmission rates.

Market Restraint: Increasing Concerns about Cybersecurity Threats

Maritime satellite communication systems are vulnerable to cyber threats such as phishing, spyware, ransomware, and distributed denial of service (DDoS) attacks. These assaults may interrupt communications, compromise important data, and even take over shipboard equipment. The growing skill of cyber attackers who can exploit weaknesses in satellite communication networks is a continuing threat to marine operators and service providers.

Market Opportunity: Integration with IoT and Big Data Analytics

The integration of IoT devices with satellite communications enables real-time monitoring and administration of marine activities, resulting in increased efficiency and lower operating costs. For instance, IoT sensors may track engine performance, fuel usage, and cargo conditions, allowing for more efficient routing and predictive repair. This capacity not only saves money but also lowers downtime and increases the longevity of marine equipment. The increasing demand for marine operators to decrease operational costs and enhance efficiency is a major driving force behind the adoption of these technologies.

How can this report add value to an organization?

Product/Innovation Strategy: The product segment helps the reader understand the different types of solutions available for deployment and their potential globally. Moreover, the study provides the reader with a detailed understanding of the maritime satellite market (by application) on the basis of the end user (merchant shipping, fishing, passenger ship, offshore, government, and others) and on the basis of service (tracking and monitoring, voice, video, and data), and product on the basis of solution (very small aperture terminal (VSAT), and mobile satellite service (MSS)).

Growth/Marketing Strategy: The maritime satellite market has seen major development by key players operating in the market, such as business expansion, partnership, collaboration, and joint venture. The favored strategy for the companies has been partnerships and contracts to strengthen their position in the maritime satellite market. For instance, in October 2023, HawkEye 360 signed a contract worth \$12.2 million to provide satellite-based RF data and training to the Indo-Pacific Partnership for Maritime Domain Awareness. Under the one-year contract, the company would provide satellite

RF data, as well as analytics and training services, with partner countries in Southeast Asia and the Pacific Islands. The unclassified data will be shared through SeaVision, a web-based tool utilized by the U.S. and its partners to boost maritime domain awareness.

Competitive Strategy: Key players in the maritime satellite market analyzed and profiled in the study involve major companies offering maritime satellite services designed for various applications. Moreover, a detailed competitive benchmarking of the players operating in the maritime satellite market has been done to help the reader understand how players stack against each other, presenting a clear market landscape. Additionally, comprehensive competitive strategies such as partnerships, agreements, and collaborations will aid the reader in understanding the untapped revenue pockets in the market.

Methodology: The research methodology design adopted for this specific study includes a mix of data collected from primary and secondary data sources. Both primary resources (key players, market leaders, and in-house experts) and secondary research (a host of paid and unpaid databases), along with analytical tools, are employed to build the predictive and forecast models.

Data and validation have been taken into consideration from both primary sources as well as secondary sources.

Key Considerations and Assumptions in Market Engineering and Validation

Detailed secondary research has been done to ensure maximum coverage of manufacturers/suppliers operational in a country.

Exact revenue information, up to a certain extent, will be extracted for each company from secondary sources and databases. Revenues specific to product/service/technology will then be estimated for each market player based on fact-based proxy indicators as well as primary inputs.

Based on the classification, the average selling price (ASP) is calculated using the weighted average method.

The currency conversion rate has been taken from the historical exchange rate of Oanda and/or other relevant websites.

Any economic downturn in the future has not been taken into consideration for the market estimation and forecast.

The base currency considered for the market analysis is US\$. Currencies other than the US\$ have been converted to the US\$ for all statistical calculations, considering the average conversion rate for that particular year.

The term “product” in this document may refer to “solution” as and where relevant.

The term “manufacturers/suppliers” may refer to “systems providers” or “technology providers” as and where relevant.

Primary Research

The primary sources involve experts from various industries, including the space industry, satellite manufacturers, satellite terminal manufacturers, and other technology providers, among others. Respondents such as CEOs, vice presidents, marketing directors, and technology and innovation directors have been interviewed to obtain and verify both qualitative and quantitative aspects of this research study.

Secondary Research

This study involves the usage of extensive secondary research, company websites, directories, and annual reports. It also makes use of databases, such as Spacenews, Businessweek, and others, to collect effective and useful information for a market-oriented, technical, commercial, and extensive study of the global market. In addition to the data sources, the study has been undertaken with the help of other data sources and websites, such as www.nasa.gov.

Secondary research was done to obtain critical information about the industry’s value chain, the market’s monetary chain, revenue models, the total pool of key players, and the current and potential use cases and applications.

Key Market Players and Competition Synopsis

The companies that are profiled have been selected based on thorough secondary research, which includes analyzing company coverage, product portfolio, market

penetration, and insights gathered from primary experts.

The maritime satellite market comprises key players who have established themselves thoroughly and have the proper understanding of the market, accompanied by start-ups who are looking forward to establishing themselves in this highly competitive market. In 2022, the maritime satellite market was dominated by established players, accounting for 88% of the market share, whereas start-ups managed to capture 12% of the market. With the increasing adoption of maritime satellite solutions across various industries, more players will enter the global maritime satellite market with each passing year.

Some prominent names established in this market are:

Inmarsat Global Limited

Iridium Communications Inc.

Thuraya Telecommunications Company

Hughes Network Systems, LLC

KVH Industries, Inc.

Viasat, Inc.

Speedcast

ST Engineering iDirect

NSSLGlobal

Marlink B.V.

Norsat International Inc.

Satcom Global

Intelsat

GT Maritime

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