

Satellite 5G New Radio (NR) Market - A Global and Regional Analysis: Focus on Frequency Band, Services, End User, Terminal Type, and Country - Analysis and Forecast, 2023-2033

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Abstracts

Introduction of Satellite 5G NR

The introduction and adoption of satellite 5G new radio (NR) is an important phase in global connectivity, as cutting-edge technology meets with space-based infrastructure to enable unparalleled levels of communication and data transfer. Unlike traditional terrestrial networks, satellite 5G NR leverages the power of low Earth orbit (LEO) and geostationary satellites to provide seamless coverage across urban, rural, and remote areas, bridging digital divides and unlocking new possibilities for industries such as telecommunications, the Internet of Things (IoT), autonomous vehicles, and others. This revolutionary combination of satellite and 5G technologies has the potential to revolutionize how connectivity will change, revolutionizing information sharing and paving the path for a more linked future.

Market Introduction

Satellite 5G new radio (NR) history can be traced back to the growth of mobile communication technology. As the need for high-speed and dependable wireless access increased, the fifth generation of cellular networks, or 5G, evolved to meet these demands. While 5G was initially designed for terrestrial installations, the promise of the technology to change global connection prompted the investigation of satellite-based solutions. The combination of 5G NR technology with satellites was designed to give universal coverage, particularly in distant and underdeveloped locations. This combination of satellite and 5G technology has the ability to go beyond the digital divide

and open up new opportunities for businesses such as IoT, autonomous cars, and others, ushering in a new era of seamless and fast worldwide communication.

Satellite 5G NR is still in its early stages of adoption, but it has begun to pick up the pace. For instance, SpaceX, OneWeb, and Telesat are among the companies working on satellite 5G NR. These companies are creating several satellite constellations that will be utilized to give 5G coverage to various regions of the world. Once deployed on a larger scale, the satellite 5G NR services will be available to be utilized in various sectors, including telecom and IT, education, and healthcare, among others.

Industrial Impact

The introduction of satellite-enabled 5G NR technology has caused a major change in the industrial environment. This innovative combination of satellite and 5G NR capabilities has released unparalleled communication possibilities, enabling companies worldwide. The industrial effect of satellite 5G NR is significant, ranging from precision agriculture and remote asset monitoring to logistics optimization and catastrophe response. It has transformed communication and data transfer in distant and difficult locations, increasing operating efficiency, allowing for real-time decision-making, and stimulating creativity. This collaboration has cleared the door for smarter cities, more resilient supply chains, and better resource management, ushering in a new era of connectedness, which is propelling sectors toward higher efficiency and sustainability.

In recent years, satellite 5G NR has begun to pick up the pace owing to the growing demands for seamless connectivity and reduced latency in various sectors of application. For instance, in July 2023, Cisco Systems, Inc. signed a collaboration with NTT Limited to help boost Private 5G adoption across the automotive, logistics, healthcare, retail, and public sectors. Together, the companies would be able to swiftly deploy crucial Industry 4.0 capabilities such as push-to-talk 'walkie-talkie' communications, automated guided vehicles (AGVs), always-connected PCs (for digital frontline employees), machine vision (such as predictive maintenance and PPE detection), and more.

Market Segmentation:

Segmentation 1: By End User

Telecom and IT

Government

Education

Healthcare

Other Industry

Telecom and IT Segment to Dominate the Global Satellite 5G NR Market (by End User)

The satellite 5G NR market is led by the telecom and IT industry, with a 30% share in 2022. Increasing demand for seamless global coverage and reduced latency are driving the growth of the satellite 5G NR market.

Satellite 5G NR technology provides major benefits to the telecommunications and information technology industries, changing connectivity and opening up new prospects. One of the most significant advantages is the ability to bridge the connection gap, particularly in distant and underserved locations. Companies such as OneWeb, SpaceX, and Amazon are developing communication satellite constellations to deliver broadband internet services to areas with limited terrestrial infrastructure. These companies can supply high-speed, dependable, and low-latency connections to allow access to digital services and address the digital divide by deploying satellite 5G NR.

Segmentation 2: By Services

Enhanced Mobile Broadband (eMBB)

Ultra-Reliable and Low Latency Communications (uRLLC)

Massive Machine-Type Communications (mMTC)

Enhanced Mobile Broadband (eMBB) Segment to Lead the Global Satellite 5G NR Market (by Services)

The enhanced mobile broadband (eMBB) segment had the highest market penetration in 2022, followed by the ultra-reliable and low latency communications (uRLLC) platform. The market for enhanced mobile broadband (eMBB) segment reported a

revenue generation of \$2.66 billion in 2022 and is expected to grow at a CAGR of 11.90% during the forecast period 2023-2033.

Segmentation 3: By Frequency Band

Below 1 GHz

1 GHz to 6 GHz

Above 6 GHz

1 GHz to 6 GHz Frequency Segment to Lead the Global Satellite 5G NR Market (by Frequency Band)

The 1 GHz to 6 GHz frequency band is expected to dominate the market with a value of \$2.06 billion in 2022 and is projected to reach \$6.37 billion by 2033.

Additionally, the frequency band type segment includes below 1 GHz and above 6 GHz segments. These frequency bands provide solutions for achieving global coverage and lowering latency. The capabilities of these different frequency bands are continuously being enhanced via the development and integration of newer technologies.

Segmentation 4: By Terminal Type

5G NR Terminals-Terrestrial

5G NR Terminals-Satcom

5G NR Terminals-Hybrid

Segmentation 5: by Region

North America - U.S. and Canada

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

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

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

North America to Dominate Global Satellite 5G NR Market (by Region)

North America accounted for the highest share of 23% in 2022 in the global satellite 5G NR market, owing to a significant number of companies based in the region. North America's growth is driven by various activities in the U.S. and Canada, as well as increased spending by commercial organizations such as Cisco Systems, Inc., Intel Corporation, Qualcomm Technologies, Inc., and government key agencies.

Recent Developments in the Satellite 5G NR Market

In July 2023, Telefonaktiebolaget LM Ericsson signed a partnership with Telia, under which both companies achieved a significant result as they successfully managed to reach geographical 5G coverage of 99 percent in Lithuania. Telia has been able to construct a national, sophisticated 5G network on 3.5 GHz and 700 MHz frequencies as a result of this partnership, providing high-speed data access across Lithuania.

In April 2023, Nokia signed a collaboration with ORMAN and Dassault Systems. Through this collaboration, the company would enhance IoT solutions in the industry with the help of a 5G private wireless network.

In February 2023, NEC Corporation signed a partnership with Cisco Systems, Inc. to broaden their collaborative efforts to encompass system integration solutions as well as future prospects in 5G xHaul and private 5G in order to assist clients in transforming their architecture and connecting more people and things. Under their Global Systems Integrator Agreement (GSIA), Cisco Systems, Inc. and NEC Corporation had expanded areas of collaboration with augmented solutions for scalable 5G xHaul transport networks, such as increased capabilities for end-to-end automation and routed optical networking to support operators' 5G monetization.

Demand – Drivers and Limitations

Market Demand Drivers: Increasing Adoption of IoT and Cloud-Based Applications

Seamless Global Coverage: Seamless global coverage, which provides unique benefits and prospects, could serve as an influential factor in the satellite 5G NR industry. One

significant advantage is the potential to provide access to rural and underdeveloped places that standard terrestrial networks cannot reach. For example, satellite 5G NR can offer remote populations a high-speed internet connection, allowing them to engage in the digital economy and access online education, telemedicine, and e-commerce services.

Market Challenges: High Latency and Network Performance Due to Inappropriate Spectrum Allocation

High Infrastructure Investment Cost: The high cost of infrastructure investment offers significant financial obstacles for the satellite 5G NR industry. The building and deployment of satellites, ground stations, and accompanying equipment necessitate significant financial resources. These expenditures might be prohibitively expensive, making it difficult for firms to start and maintain operations in the satellite 5G NR market.

Market Opportunities: Communication Satellites Constellation Deployment

Hybrid Satellite Terminals: Due to their capacity to bridge the connection gap in rural or underserved locations, hybrid satellite terminals provide considerable business potential in the satellite 5G NR market. These terminals combine the power of satellite and 5G networks to provide customers with dependable and high-speed internet access in areas where traditional terrestrial infrastructure is restricted or non-existent. This one-of-a-kind capacity opens up a wide range of possible uses and income sources for companies.

How can this report add value to an organization?

Product/Innovation Strategy: The product segment helps the reader understand the different types of products available for deployment and their potential globally. Moreover, the study provides the reader with a detailed understanding of the satellite 5G NR market by application on the basis of the end user (telecom and IT, government, healthcare, education, and other industries), services (enhanced mobile broadband (eMBB), ultra-reliable and low latency communication (uRLLC), and massive machine-type communication (mMTC)) and product on the basis of the frequency band (below 1 GHz, 1 GHz to 6 GHz, and above 6 GHz), and terminal type (5G NR terminals-terrestrial, 5G NR terminals-satcom, and 5G NR terminals-hybrid).

Growth/Marketing Strategy: The satellite 5G NR 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 merger and acquisition to strengthen their position in the satellite 5G NR market. For instance, in July 2023, Telefonaktiebolaget LM Ericsson established a next-generation smart manufacturing and technology center in Tallinn, Estonia, with the goal of driving innovation in Europe. The new plant, a greenfield investment of around \$169 million, prioritizes sustainability and operating efficiency.

Competitive Strategy: Key players in the satellite 5G NR market analyzed and profiled in the study involve major satellite 5G NR offering companies providing services and different satellite 5G NR terminals. Moreover, a detailed competitive benchmarking of the players operating in the satellite 5G NR 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 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 satellite 5G NR 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 satellite 5G NR market was dominated by established players, accounting for 80% of the market share, whereas the start-ups managed to capture 20% of the market. With the growing need for global connectivity arising on a daily basis, more players will enter the global satellite 5G NR market with each passing year.

Key Companies Profiled:

Cisco Systems, Inc.

Deutsche Telekom AG

Fujitsu

Gatehouse Satcom A/S

Huawei Technologies Co. Ltd.

Intel Corporation

Nokia

NEC Corporation

Telefonaktiebolaget LM Ericsson

ZTE Corporation

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