

UAV Satellite Communication (SATCOM) Market - A Global and Regional Analysis: Focus on Application, Frequency Band, Drone Type, Component, and Country - Analysis and Forecast, 2023-2033

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Abstracts

Global UAV Satellite Communication (SATCOM) Market Overview

The global UAV satellite communication (SATCOM) market is estimated to reach \$10,725.6 million in 2033 from \$9,365.0 million in 2022, at a growth rate of 1.34% during the forecast period 2023-2033. The global UAV satellite communication (SATCOM) market is expected to be driven by the rise in applications of UAVs across multiple industries, increasing demand for multiband and multifunction antennas, hybrid communication systems, and beyond-visual-line-of-sight (BVLOS) operations.

Market Lifecycle Stage

The global UAV satellite communication (SATCOM) market has gained significant importance over the years 2019-2022. Over the past few years, industry participants have been focusing on technologies such as software-defined radios, integration of SATCOM with AI, and lightweight SATCOM antennae, as these are the critical parameters that increase the flexibility and reliability of UAV communication. Furthermore, enabling beyond-visual-line-of-sight (BVLOS) operations, size, weight, and power (SWaP) requirements for SATCOM terminals and deployment of low Earth orbit (LEO) satellite constellation technologies are driving the global UAV satellite communication (SATCOM) market growth across sectors.

Impact

The global UAV satellite communication (SATCOM) market has reached great advancement in a variety of fields, such as precision agriculture and environmental monitoring, surveillance and mapping, and delivery services. The major challenges in the global UAV satellite communication (SATCOM) market are cybersecurity, regulatory challenges, limited bandwidth, and supply chain challenges. The most pressing challenge facing the drone industry is regulation. With more and more UAVs being deployed and generating increasing amounts of data, there is a growing demand for high-bandwidth communication links. However, there is a finite amount of available bandwidth, which can limit the number of UAVs that can be deployed and the amount of data that can be transmitted. Additionally, the development and deployment of satellite communication systems is another challenge. Moreover, these challenges are impacting the global UAV satellite communication (SATCOM) market. On the other hand, the demand for high-speed, low latency, and secure communication links are the major drivers of growth in the global UAV satellite communication (SATCOM) market.

Market Segmentation

Segmentation 1: by Application

Marine Surveillance

Disaster Management

Surveying and Mapping

Industrial Inspection and Monitoring

Military ISR

Agriculture and Forestry

Civil Surveillance

Cinematography

Based on application, the global UAV satellite communication (SATCOM) market is expected to be dominated by the agriculture and forestry segment during the forecast period.

Segmentation 2: by Drone Type

Fixed Wing

Medium-Altitude Long-Endurance (MALE)

High-Altitude Long-Endurance (HALE)

Mini UAVs

VTOL

Rotary Wing

Single-Rotor

Multi-Rotor

Segmentation 3: by Frequency Band

Ku Band

Ka Band

X Band

C Band

S Band

L Band

Q Band

V Band

The global UAV satellite communication (SATCOM) market by frequency band includes the Ku band, which is expected to dominate the market.

Segmentation 4: by Component

Antennae

Amplifier

Upconverter

Downconverter

Analog-to-Digital Converter

Digital-to-Analog Converter

Modulator

Demodulator

Encoder

Decoder

Scrambler

Descrambler

Multiplexer

Demultiplexer

User Interface

Wiring Solution

Power Unit

Casing

The global UAV satellite communication (SATCOM) market by component includes a user interface, which is expected to dominate the market.

Segmentation 5: by Region

North America - U.S. and Canada

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

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

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

Europe accounted for the highest share of 29.88% in the global UAV satellite communication (SATCOM) market by value in 2022, owing to a significant number of companies based in the region.

Recent Developments in the Global UAV Satellite Communication (SATCOM) Market

On January 2023, as part of the Iris air traffic modernization program, Inmarsat Global Limited and the European Space Agency (ESA) signed a contract to develop a tiny satellite terminal for unmanned aerial vehicles (UAVs), clearing the path for their safe integration into commercial airspace.

On December 2022, Inmarsat Global Limited collaborated with LikeAbird, a manufacturer of innovative systems, products, and solutions for the UAV and robotics industries, to drive technology development and reinforce Velaris as the BVLOS service of choice.

In November 2022, Gilat Satellite Networks signed a multi-year, multimillion-dollar strategic agreement with a UAV manufacturer to enable advanced capabilities in high/medium-altitude, long-endurance unmanned aerial vehicles via next-generation BRP60 satellite communication terminals.

In April 2022, SKYTRAC signed a contract with Kea Aerospace to provide a

midband Iridium Certus SATCOM terminal to be installed onboard its HALE UAV platform.

In March 2022, Iridium Communications Inc. partnered with AnsuR Technologies to provide Iridium with its video compression software into Iridium Certus service. The service would provide high-precision communication services for its customers, including emergency responders, global militaries, NGOs, and businesses.

In February 2022, Harvest Technology Group partnered with Inmarsat Global Limited to launch ultra-low bandwidth C2 data and high definition (HD) livestream capabilities to the commercial UAV market in London.

In December 2021, Nordic Unmanned signed a contract with SKYTRAC Systems LTD. for the installation of IMS -350 on a Staaker BG-200 UAV, enabling command and control capabilities during mapping, photogrammetry, LiDAR scanning flight operations and logistical operations.

Demand - Drivers and Limitations

Following are the drivers for the global UAV satellite communication (SATCOM) market:

Evolving SWaP Requirements for UAV SATCOM Terminals

Enabling BVLOS Drone Operations

Increased Deployment of Satellite Constellation

Following are the challenges for the global UAV satellite communication (SATCOM) market:

Cybersecurity

Regulatory Challenges

Dependence on Satellite Availability

Limited Bandwidth

Following are the opportunities for the global UAV satellite communication (SATCOM) market:

Increase in the Bandwidth up to 20 Megabits per Second

How can this report add value to an organization?

Platform/Innovation Strategy: The product segment helps the reader to understand the different types of frequency bands and components utilized in the SATCOM terminal. Moreover, the study provides the reader with a detailed understanding of the different satellite terminal components such as antennae, amplifier, modem, user interface, wiring solution, and casing.

Growth/Marketing Strategy: The global UAV satellite communication (SATCOM) market has seen major development activities by key players operating in the market, such as business expansion activities, contracts, mergers, partnerships, collaborations, and joint ventures. The favored strategy for the companies has been contracts to strengthen their position in the global UAV satellite communication (SATCOM) market. For instance, on January 2023, as part of the Iris air traffic modernization program, Inmarsat Global Limited and the European Space Agency (ESA) signed a contract to develop a tiny satellite terminal for unmanned aerial vehicles (UAVs), clearing the path for their safe integration into commercial airspace. Furthermore, in December 2022, Inmarsat Global Limited collaborated with LikeAbird, a manufacturer of innovative systems, products, and solutions for the UAV and robotics industries, to drive technology development and reinforce Velaris as the BVLOS service of choice.

Competitive Strategy: Key players in the global UAV satellite communication (SATCOM) market analyzed and profiled in the study involve satellite terminal manufacturers that offer antennae, amplifier, modem, user interface, wiring solution, and casing. Moreover, a detailed market share analysis of the players operating in the global UAV satellite communication (SATCOM) market offers advanced technologies such as phased array antennae and hybrid communication systems. Additionally, comprehensive competitive strategies such as contracts, partnerships, agreements, acquisitions, and collaborations will aid the reader in understanding the untapped revenue pockets in the market.

Key Market Players and Competition Synopsis

The companies that are profiled have been selected based on inputs gathered from primary experts and analysis of the company's coverage, product portfolio, and market penetration.

In 2021, the top segment players leading the market included established players, constituting 68% of the presence in the market. Emerging market participants include startup entities that account for approximately 32% of the presence in the market.

Key Companies Profiled

Honeywell International Inc.

Cobham Aerospace Communications

Thales Group

Get SAT Ltd.

Viasat Inc.

Harvest Technology Group Pty Limited.

SKYTRAC Systems Ltd.

Gilat Satellite Networks

Inmarsat Global Limited

CTECH

Indra

Cowave Communication Technology Co., Ltd

Orbit Communication Systems Ltd.

Hughes Network Systems, LLC

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