

Global Satellite Services Market: Analysis By Type (Consumer Services, Fixed Satellite Services, Mobile Satellite Services, Remote Sensing, and Space Flight Management Services), By End Use (Media & Entertainment, Defense, Retail & Enterprise, Government, Aerospace, Aviation, and Others), By Region Size and Trends with Impact of COVID-19 and Forecast up to 2028

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Abstracts

The global satellite services market in 2022 was valued at US\$134.48 billion. The market is expected to reach US\$160.57 billion by 2028. Satellite services means mobile wireless voice and data services (other than multi-channel video services and data services reasonably ancillary thereto) provided, via fixed or non-geostationary satellite. Satellite services can fill in the gaps in areas where terrestrial systems are not viable and help realize the vision of communications services available everywhere in the nation.

Satellite services are used for various applications such as agriculture, maritime, defense & security, automotive & transportation, among others. The rising desire for high-speed uninterrupted internet connectivity, which is being supported by the global digitization of all private and government activities, is also a major reason behind the rising requirement of satellite services. Therefore, expanding demand for uninterrupted internet is one of the main factors that would drive the demand for satellite services in the forthcoming years. The market is expected to grow at a CAGR of approx. 3% during the forecasted period of 2022-2028.

Market Segmentation Analysis:

By Type: The report provides the bifurcation of the market into five segments based on the types: Consumer Services, Fixed Satellite Services, Mobile Satellite Services, Remote Sensing, and Space Flight Management Services. In 2022, Consumer services held a major share in the market. On the other hand, mobile satellite services segment is expected to grow at the highest CAGR in the forthcoming years as these are rapidly being used in a range of applications, including telecommunication, weather prediction, and navigation, military intelligence, and space exploration. Increase in demand for portability, advancement of digital technology and growing demand of mobility are some of the factors boosting the growth of mobile satellite services market.

By End Use: The report further provides the segmentation based on the end use: Media & Entertainment, Defense, Retail & Enterprise, Government, Aerospace, Aviation, and Others. The media & entertainment segment held the highest share in the market. The market's expansion is aided by the increasing demand for satellite television services in developing economies such as China, India, Brazil and others and rising use of Internet-based services such as live streaming, high-definition broadcasting, and video on demand.

By Region: The report provides insight into the satellite services market based on the regions North America, Europe, Asia Pacific, and Latin America, Middle East & Africa. North America held the major share in the market owing to the surging usage of satellite communication services for IoT, as well as in the disaster management areas in the region. The US market dominated the region due to the healthy growth remote sensing and fixed satellite services segment in the region.

In Europe, Germany is the dominating region. Whereas, in the Asia Pacific region, China dominated the market owing to the growing number of airports plays a vital role in installing aviation satellite communication terminals and increasing use of surveillance and communication satellites to offer enhanced safety and communication.

Market Dynamics:

Growth Drivers: The global satellite services market has been growing over the past few years, due to factors such as rising demand for earth observation services, expanding demand for uninterrupted internet, growing adoption of DTH subscriptions and HDTV channels, flourishing media and entertainment industry, increasing deployment of small satellites, increasing investment in military satellite communication solutions, and many

other factors. Earth observation satellites enable environmental monitoring and protection, resource management, humanitarian response, and sustainable development (EO satellites). High need for disaster management, agriculture, mapping, and natural resources survey drives the need for earth observation services in numerous sectors such as oil & gas, civil engineering, agriculture, and others, which results in increasing demand for satellite services, thus driving the overall market growth.

Challenges: However, the market has been confronted with some challenges specifically, intensifying cyber-security concerns, lack of dedicated launch vehicles for small satellites, emerging issues regarding space debris, etc.

Trends: The market is projected to grow at a fast pace during the forecast period, due to various latest trends such as rising implementation of IoT and autonomous systems, ongoing development of smart cities, deployment of 5G networks through satellites, etc. Additionally, the ongoing development of smart cities is one of the most significant drivers for satellite services, as it helps in the development of high degree of connectivity they need. Moreover, the emerging development of the 5G satellite to support 5G network deployment is expected to offer lucrative opportunities for the satellite services market in the future.

Impact Analysis of COVID-19 and Way Forward:

The COVID-19 pandemic has hampered mission-deployments along with slowing down the new product deliveries due to disruption of the supply chain. The temporary lockdown of various design, development, and manufacturing facilities with limited operational launch stations has limited the market growth during pandemic. The satellite service operator has experienced difficulties with the COVID-19 pandemic, as customers and partners have had delays in completing projects and making payments.

Competitive Landscape:

The global satellite services market is fragmented, with key players operating on global and regional levels. The key players in the global satellite services market are:

SES S.A.

Viasat Inc.

EchoStar Corporation

Telesat

Eutelsat Communications S.A.

Al Yah Satellite Communications Company P.J.S.C. (Thuraya
Telecommunications Company)

The Sky Perfect JSAT Group

Gilat Satellite Networks

Intelsat S.A.

L3Harris Technologies, Inc.

Globalstar Inc.

Inmarsat

Iridium Communications, Inc.

Some of the strategies among key players in the market for satellite services are platform development and strategic alliances to expand their respective portfolios and gain a robust footing in the global market. For instance, in February 2022, Intelsat, which is the world's largest integrated satellite operator, expanded its collaboration with SKY Perfect JSAT Corporation to employ its next-generation JCSAT-1C High-throughput Satellites (HTS) over Asia-Pacific. The partnership helps airlines and customers promote a superior passenger experience onboard aircraft through faster Internet connection speeds. On the other hand, in January 2022, Intelsat and Gilat Satellite Networks expanded their strategic partnership in commercial aviation. Intelsat will use Gilat's SkyEdge II-c system to expand commercial and business aviation services in Asia-Pacific.

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