

Global Satellite Direct-to-Smartphone Communication Services Market 2026 by Company, Regions, Type and Application, Forecast to 2032

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Abstracts

According to our (Global Info Research) latest study, the global Satellite Direct-to-Smartphone Communication Services market size was valued at US\$ 630 million in 2025 and is forecast to a readjusted size of US\$ 5293 million by 2032 with a CAGR of 33.8% during review period.

In 2025, the global Satellite Direct-to-Smartphone Communication Services market is estimated at approximately USD 612 million, with typical retail add-on prices mostly ranging from about USD 3 to USD 10 per line per month, while China's Tiantong-based direct satellite mobile service has a basic monthly function fee of around RMB 10. Satellite Direct-to-Smartphone Communication Services refer to connectivity services that enable smartphones or satellite-capable mobile handsets to connect directly to satellite networks through low Earth orbit satellites, geostationary satellites, or mobile satellite systems when terrestrial cellular coverage is unavailable or insufficient. These services support emergency assistance, location sharing, text messaging, voice calling, selected application data, and mobile data connectivity. They are typically delivered through collaboration among satellite network platforms, mobile network operators, NTN platform providers, and device ecosystem players, with product forms including mobile operator satellite add-on services, device-embedded satellite services, satellite network wholesale services, and managed satellite mobile communication services. Major application scenarios include personal off-grid connectivity, public safety and emergency response, remote area coverage extension, and enterprise or industrial field operations.

Satellite Direct-to-Smartphone Communication Services are moving from an emergency feature on premium smartphones to an early-stage commercial mobile coverage

extension service. The global market is estimated at approximately USD 612 million in 2025 and is expected to reach around USD 897 million in 2026, driven by device-embedded emergency services, mobile operator satellite add-ons, and wholesale connectivity services provided by satellite platforms.

The core value of this market is not to replace terrestrial cellular networks, but to fill coverage gaps in areas where mobile networks are unavailable or unreliable. Near-term demand is expected to come from emergency response, outdoor personal connectivity, remote area coverage extension, maritime and island connectivity, and resilient communications for enterprise or public-sector users. In the short term, SOS, location sharing, text messaging, and selected app data are the most realistic commercial services. Over the longer term, broader mobile data connectivity could significantly expand the addressable market.

The competitive landscape is shaped by cooperation among satellite network platforms, mobile network operators, and device ecosystem players. Starlink currently has strong commercialization momentum due to its constellation scale and operator partnerships. AST SpaceMobile represents a broadband direct-to-standard-smartphone route with meaningful long-term upside. Globalstar benefits from its early integration with Apple's satellite features, while Skylo, Iridium, Viasat, Space42, and other players are entering through NTN, MSS spectrum, and regional platform capabilities. In China, China Telecom has taken an early lead through Tiantong-based services, while China Mobile and China Unicom may further expand the market after receiving satellite mobile communication service licenses.

Key growth drivers include broader smartphone compatibility, improved satellite capacity and link reliability, clearer spectrum coordination, and commercially attractive operator pricing models. The market is likely to maintain strong growth through 2032, but revenue will be unevenly distributed across technology routes and business models. Companies with satellite network assets, operator partnerships, and terminal ecosystem integration are more likely to build early revenue loops.

Overall, Satellite Direct-to-Smartphone Communication Services represent one of the most commercially visible segments within integrated space-terrestrial communications. While near-term revenue will remain smaller than traditional mobile services, the market has strong potential due to its safety value, coverage-extension role, and operator add-on monetization model. For market sizing, it is important to separate satellite platform wholesale revenue, mobile operator retail add-on revenue, and device ecosystem service revenue to avoid double counting.

This report is a detailed and comprehensive analysis for global Satellite Direct-to-Smartphone Communication Services market. Both quantitative and qualitative analyses are presented by company, by region & country, by Type and by Application. As the market is constantly changing, this report explores the competition, supply and demand trends, as well as key factors that contribute to its changing demands across many markets. Company profiles and product examples of selected competitors, along with market share estimates of some of the selected leaders for the year 2025, are provided.

Key Features:

Global Satellite Direct-to-Smartphone Communication Services market size and forecasts, in consumption value (\$ Million), 2021-2032

Global Satellite Direct-to-Smartphone Communication Services market size and forecasts by region and country, in consumption value (\$ Million), 2021-2032

Global Satellite Direct-to-Smartphone Communication Services market size and forecasts, by Type and by Application, in consumption value (\$ Million), 2021-2032

Global Satellite Direct-to-Smartphone Communication Services market shares of main players, in revenue (\$ Million), 2021-2026

The Primary Objectives in This Report Are:

To determine the size of the total market opportunity of global and key countries

To assess the growth potential for Satellite Direct-to-Smartphone Communication Services

To forecast future growth in each product and end-use market

To assess competitive factors affecting the marketplace

This report profiles key players in the global Satellite Direct-to-Smartphone Communication Services market based on the following parameters - company overview, revenue, gross margin, product portfolio, geographical presence, and key

developments. Key companies covered as a part of this study include Space Exploration Technologies Corp., AST SpaceMobile, Inc., Globalstar, Inc., Lynk Global, Inc., Skylo Technologies, Inc., Iridium Communications Inc., Viasat, Inc., EchoStar Corporation, Omnispace, LLC, Ligado Networks LLC, etc.

This report also provides key insights about market drivers, restraints, opportunities, new product launches or approvals.

Market segmentation

Satellite Direct-to-Smartphone Communication Services market is split by Type and by Application. For the period 2021-2032, the growth among segments provides accurate calculations and forecasts for Consumption Value by Type and by Application. This analysis can help you expand your business by targeting qualified niche markets.

Market segment by Type

Mobile Operator Retail Add On Services

Device Embedded Satellite Services

Satellite Network Wholesale Services

Managed Satellite Mobile Services

Other

Market segment by Terminal Compatibility Mode

Standard Cellular Smartphone Direct Services

Satellite Capable Smartphone Services

NTN Compatible Device Services

Other

Market segment by Application

Consumer Personal Connectivity

Public Safety and Emergency Response

Remote Area Coverage Extension

Enterprise and Industrial Operations

Other

Market segment by players, this report covers

Space Exploration Technologies Corp.

AST SpaceMobile, Inc.

Globalstar, Inc.

Lynk Global, Inc.

Skylo Technologies, Inc.

Iridium Communications Inc.

Viasat, Inc.

EchoStar Corporation

Omnispace, LLC

Ligado Networks LLC

Terrestar Solutions Inc.

Space42 PLC

Satellite Connect Europe

China Satellite Communications Co., Ltd.

Shanghai Spacesail Technologies Co., Ltd.

Deutsche Telekom AG

AT&T Inc.

Verizon Communications Inc.

Rogers Communications Inc.

One New Zealand Group Limited

Telstra Group Limited

Optus

KDDI Corporation

SoftBank Corp.

NTT DOCOMO, INC.

Rakuten Group, Inc.

Vodafone Group Plc

Virgin Media O2

Orange S.A.

VEON Ltd.

China Telecommunications Corporation

China Mobile Communications Group Co., Ltd.

China United Network Communications Group Co., Ltd.

HKT Limited

Globe Telecom, Inc.

Vodafone Idea Limited

Airtel Africa plc

Empresa Nacional de Telecomunicaciones S.A.

Market segment by regions, regional analysis covers

North America (United States, Canada and Mexico)

Europe (Germany, France, UK, Russia, Italy and Rest of Europe)

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

South America (Brazil, Rest of South America)

Middle East & Africa (Turkey, Saudi Arabia, UAE, Rest of Middle East & Africa)

The content of the study subjects, includes a total of 13 chapters:

Chapter 1, to describe Satellite Direct-to-Smartphone Communication Services product scope, market overview, market estimation caveats and base year.

Chapter 2, to profile the top players of Satellite Direct-to-Smartphone Communication Services, with revenue, gross margin, and global market share of Satellite Direct-to-Smartphone Communication Services from 2021 to 2026.

Chapter 3, the Satellite Direct-to-Smartphone Communication Services competitive situation, revenue, and global market share of top players are analyzed emphatically by landscape contrast.

Chapter 4 and 5, to segment the market size by Type and by Application, with consumption value and growth rate by Type, by Application, from 2021 to 2032.

Chapter 6, 7, 8, 9, and 10, to break the market size data at the country level, with revenue and market share for key countries in the world, from 2021 to 2026. and Satellite Direct-to-Smartphone Communication Services market forecast, by regions, by Type and by Application, with consumption value, from 2027 to 2032.

Chapter 11, market dynamics, drivers, restraints, trends, Porters Five Forces analysis.

Chapter 12, the key raw materials and key suppliers, and industry chain of Satellite Direct-to-Smartphone Communication Services.

Chapter 13, to describe Satellite Direct-to-Smartphone Communication Services research findings and conclusion.

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