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# Global Non-Terrestrial Network Module Market Growth 2026-2032

https://marketpublishers.com/r/GC3C690E0AC8EN.html
Date: October 2026
Pages: 104
Price: US$ 3,660.00 (Single User License)
ID: GC3C690E0AC8EN

## Abstracts

The global Non-Terrestrial Network Module market size is predicted to grow from US$ 587 million in 2025 to US$ 2558 million in 2032; it is expected to grow at a CAGR of 23.4% from 2026 to 2032.

The Non-Terrestrial Network (NTN) module is a hardware device used to achieve satellite communications or other non-terrestrial network connections. It enables terminal devices (such as smartphones, IoT devices, etc.) to access the Internet or private networks directly through satellites or other high-altitude platforms (such as drones and balloons) without relying on traditional ground base stations.

## Key Findings

Global Non-Terrestrial Network Module shipments were approximately 25 million units in 2025

The global average selling price was approximately US$24 per module in 2025

Satellite communication modules currently represent the primary commercial product form

IoT and ubiquitous connectivity constitute a core commercialization direction for NTN modules

Cellular-NTN convergence is becoming an important direction for next-generation module design

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## Market Trends

The Non-Terrestrial Network Module industry is transitioning from proprietary satellite connectivity toward standardized terrestrial and non-terrestrial network convergence. 3GPP Release 17 established an important foundation for NTN commercialization, while subsequent standard evolution is improving terminal capabilities, spectrum utilization, mobility management and interoperability. Module architectures are increasingly evolving toward multi-mode designs combining terrestrial cellular connectivity with satellite NTN, allowing devices to preferentially use terrestrial networks where coverage exists and switch to satellite connectivity in remote or uncovered areas. At the product level, lower power consumption, smaller form factors, higher integration, improved antenna adaptability and reduced system cost are becoming important development priorities. Meanwhile, NTN capability is expanding from specialized satellite terminals toward IoT devices, energy infrastructure, emergency terminals, smartphones and wearable devices, gradually turning satellite connectivity from a specialized function into a supplementary layer of ubiquitous wireless connectivity.

## Market Dynamics

### Drivers

The principal drivers of the Non-Terrestrial Network Module market are the persistent coverage limitations of terrestrial cellular networks and growing demand for continuous connectivity across remote, maritime, mountainous and infrastructure-constrained environments. Expansion of satellite constellations and increasing convergence between satellite operators and the cellular ecosystem are improving the commercial foundation for NTN services. Standardized 3GPP NTN technologies also reduce fragmentation between traditional proprietary satellite solutions and cellular communications, enabling module vendors and terminal manufacturers to develop products around a more unified technology ecosystem. Demand from asset tracking, remote monitoring, energy infrastructure, emergency communications and consumer devices is therefore expanding the addressable market for NTN modules.

### Restraints

Commercial deployment remains constrained by module and service costs, satellite spectrum and network availability, terminal antenna requirements, power consumption and differences in regional regulatory frameworks. Compared with terrestrial cellular connections, NTN links generally face longer propagation distances and more

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demanding link-budget conditions, which can limit data rates, latency performance and battery life in certain applications. In addition, satellite network coverage, supported bands and commercial service availability vary between operators and regions, increasing certification, integration and lifecycle-management complexity for module manufacturers and downstream customers.

### Opportunities

The largest incremental opportunities are emerging from applications that require connectivity beyond conventional terrestrial coverage. Low-power IoT NTN creates opportunities in logistics tracking, agriculture, environmental monitoring, maritime assets and remote infrastructure, while cellular-satellite converged modules can provide backup links for smart energy and industrial systems. Emergency communications offer another high-value use case because NTN can maintain basic connectivity when terrestrial infrastructure is unavailable or damaged. As NTN capabilities move into mainstream mobile platforms, smartphones, wearables and other personal devices could substantially expand module shipment potential, while higher-performance 5G NR NTN provides longer-term opportunities for richer broadband and professional communication applications.

### Challenges

The industry faces the challenge of converting rapidly evolving NTN standards and satellite deployments into scalable module shipments with sustainable economics. Module suppliers must simultaneously address RF complexity, multi-band support, antenna matching, certification, power optimization and compatibility with multiple network operators. Competition may also intensify as conventional cellular module vendors, satellite technology companies and terminal platform suppliers expand their NTN capabilities. Uncertainty regarding satellite constellation deployment schedules, service pricing, spectrum policy and the pace of downstream adoption could create significant differences between technical readiness and actual commercial demand.

## Industry Chain Analysis

The upstream Non-Terrestrial Network Module industry chain consists primarily of modem and baseband chipsets, RF front-end components, power-management ICs, memory, SIM/eSIM components, oscillators, filters, connectors, antennas and other electronic components, together with satellite network protocols, testing and certification resources. Chipset and RF performance directly affect supported NTN standards, frequency bands, power consumption, link budget and module integration costs. The

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midstream consists of module manufacturers that integrate communication chipsets, RF circuits, protocol stacks, firmware and hardware interfaces into standardized modules and conduct RF calibration, reliability testing, operator adaptation and regulatory certification. Product competitiveness therefore depends not only on component procurement costs but also on RF engineering, software integration, certification capability and customer technical support.

Downstream value creation occurs through integration of NTN modules into IoT terminals, smart-energy equipment, emergency communication devices, mobile devices, wearables and other connected equipment. Module vendors increasingly provide reference designs, antenna guidance, software development tools and network adaptation support to shorten customer development cycles. As terrestrial and satellite connectivity converge, the value chain is becoming more interconnected: chipset vendors provide standardized NTN platforms, module manufacturers convert them into deployable hardware, satellite and mobile operators provide connectivity, and terminal manufacturers create application-specific products. The ability to support multiple networks and deliver stable connectivity across diverse operating environments is becoming an increasingly important source of module-level value.

## Segment Insights

By non-terrestrial platform, Non-Terrestrial Network Modules can be divided into Satellite Communication Modules, High Altitude Platform Communication Modules and UAV Communication Modules. Satellite communication modules currently constitute the most mature commercial segment because satellite systems can provide wide-area coverage without requiring continuous terrestrial infrastructure. Within this segment, module capabilities are increasingly differentiated by satellite orbit compatibility, supported frequency bands, 3GPP protocol versions, data rates, power consumption and terrestrial-network fallback capabilities. Low-power standardized modules are particularly suitable for IoT terminals that transmit relatively small data packets, while higher-performance NTN solutions are progressively targeting applications requiring greater capacity and richer communication functions.

HAPS and UAV communication modules represent emerging forms of NTN connectivity with different deployment characteristics. HAPS platforms can provide persistent regional coverage at lower altitudes than satellites, potentially offering favorable latency and localized capacity, while UAV-based communication platforms provide flexible and rapidly deployable coverage for temporary, emergency or specialized scenarios. Their commercial penetration remains dependent on platform deployment, spectrum

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coordination, airspace regulation and network economics. Over the longer term, interoperability among satellite, HAPS, UAV and terrestrial cellular networks may increase demand for multi-mode modules capable of dynamically selecting the most appropriate access network.

## Downstream Market Opportunities

IoT is a fundamental downstream market for NTN modules because many connected assets operate outside reliable terrestrial cellular coverage, particularly in logistics, agriculture, environmental monitoring, maritime and remote industrial applications. Smart energy creates demand for resilient communications across power, renewable-energy, oil and gas and remote infrastructure, while emergency communications benefit from NTN's ability to provide connectivity when terrestrial networks are unavailable. Mobile and wearable devices represent an important emerging opportunity as satellite messaging and emergency connectivity become integrated into mainstream consumer terminals. Future differentiation will increasingly depend on whether modules can combine low power consumption, compact dimensions, competitive cost and seamless switching between terrestrial and non-terrestrial networks.

## Regional Insights

North America is an important early commercialization market for Non-Terrestrial Network Modules, supported by an active satellite communications ecosystem, strong demand for remote-area connectivity and early deployment of satellite-enabled consumer and IoT services. Europe also has a substantial industrial and satellite communications foundation, with demand spanning transportation, energy, public safety and industrial IoT. Regional market development will increasingly depend on the availability of compatible satellite networks, spectrum arrangements, operator partnerships and certification ecosystems rather than solely on terrestrial cellular penetration.

Asia-Pacific is becoming increasingly important due to its large electronics manufacturing base, extensive IoT ecosystem and presence of major communication module suppliers. China plays a significant role in module manufacturing and downstream IoT integration, while Japan, South Korea and other developed Asian markets provide opportunities in consumer electronics, automotive, industrial and emergency connectivity. Emerging markets with large geographic areas and incomplete terrestrial network coverage also present long-term opportunities, although commercial adoption will depend heavily on satellite service affordability and local regulatory

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approval.

## Competitive Landscape Analysis

The Non-Terrestrial Network Module market combines established wireless module manufacturers with electronics companies expanding into satellite-enabled connectivity. Murata Manufacturing emphasizes highly integrated wireless module design and miniaturization capabilities; Fibocom, Quectel and SIMCom leverage established cellular IoT module portfolios, large customer ecosystems and experience in global certification to extend into standardized NTN products; Sierra Wireless, now part of Semtech, brings longstanding cellular IoT expertise and satellite-connectivity ecosystem cooperation; Rolling Wireless focuses strongly on automotive-grade wireless modules and is positioned to integrate NTN capability into connected-vehicle platforms; Telit combines cellular IoT modules, connectivity technologies and device-management capabilities; and Compal Electronics participates from a broader electronics design and manufacturing platform. Competitive differentiation is increasingly shifting from basic NTN support toward multi-network compatibility, supported bands, power efficiency, module size, certification coverage, software integration and the ability to support customers from module design through commercial network deployment.

## Report Scope

LP Information, Inc. (LPI) ' newest research report, the “Non-Terrestrial Network Module Industry Forecast” looks at past sales and reviews total world Non-Terrestrial Network Module sales in 2025, providing a comprehensive analysis by region and market sector of projected Non-Terrestrial Network Module sales for 2026 through 2032. With Non-Terrestrial Network Module sales broken down by region, market sector and sub-sector, this report provides a detailed analysis in US$ millions of the world Non-Terrestrial Network Module industry.

This Insight Report provides a comprehensive analysis of the global Non-Terrestrial Network Module landscape and highlights key trends related to product segmentation, company formation, revenue, and market share, latest development, and M&A activity. This report also analyzes the strategies of leading global companies with a focus on Non-Terrestrial Network Module portfolios and capabilities, market entry strategies, market positions, and geographic footprints, to better understand these firms’ unique position in an accelerating global Non-Terrestrial Network Module market.

This Insight Report evaluates the key market trends, drivers, and affecting factors

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shaping the global outlook for Non-Terrestrial Network Module and breaks down the forecast by Type, by Application, geography, and market size to highlight emerging pockets of opportunity. With a transparent methodology based on hundreds of bottom-up qualitative and quantitative market inputs, this study forecast offers a highly nuanced view of the current state and future trajectory in the global Non-Terrestrial Network Module.

This report presents a comprehensive overview, market shares, and growth opportunities of Non-Terrestrial Network Module market by product type, application, key manufacturers and key regions and countries.

## Market Segmentation

### Segmentation by Type:

Satellite Communication Module

High Altitude Platform Communication Module

UAV Communication Module

### Segmentation by NTN Technology:

NB-IoT NTN

LTE-M NTN

5G NR NTN

Others

### Segmentation by Satellite Orbit:

GEO NTN Module

MEO NTN Module

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LEO NTN Module

Multi-Orbit NTN Module

## Segmentation by Operating Frequency Band:

L-band NTN Module

S-band NTN Module

Other Frequency Band NTN Module

## Segmentation by Application:

IoT

Smart Energy

Emergency Communications

Mobile & Wearables

Others

## This report also splits the market by region:

Americas

United States

Canada

Mexico

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- Brazil

APAC

- China
- Japan
- Korea
- Southeast Asia
- India
- Australia

Europe

- Germany
- France
- UK
- Italy
- Russia

Middle East & Africa

- Egypt
- South Africa
- Israel
- Turkey
- GCC Countries

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

Murata Manufacturing

Fibocom

Quectel

Sierra Wireless(Semtech)

Rolling Wireless

Telit

SIMCom Wireless Solutions

Compal Electronics

## Key Questions Addressed in this Report

What is the 10-year outlook for the global Non-Terrestrial Network Module market?

What factors are driving Non-Terrestrial Network Module market growth, globally and by region?

Which technologies are poised for the fastest growth by market and region?

How do Non-Terrestrial Network Module market opportunities vary by end market size?

How does Non-Terrestrial Network Module break out by Type, by Application?

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