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Direct-to-Device (D2D) Market by Service Type (Direct to IoT, Direct to Cell), Customer Type (Consumer, Enterprise Network, Government & Defense), Latency Class, Frequency, Orbit and Region-Global Forecast to 2030

https://marketpublishers.com/r/D5019D6B65C1EN.html
Date: October 2025
Pages: 238
Price: US$ 4,950.00 (Single User License)
ID: D5019D6B65C1EN

Abstracts

The Direct-to-Device (D2D) market is projected to grow from USD 0.57 billion in 2025 to USD 2.64 billion by 2030, at a CAGR of 35.6%. Rising demand for ubiquitous connectivity, rapid IoT adoption, 3GPP NTN standardization, LEO constellation expansion, and resilient communication needs are the key drivers of the D2D market.

“S-band is projected to register the fastest growth during the forecast period.”

Based on frequency, the S-band is projected to register the fastest growth in the D2D market due to its favorable balance between coverage and capacity. Positioned between 2 and 4 GHz, the S-band offers stronger signal penetration than higher frequencies, making it more reliable for mobile and IoT applications in remote and obstructed environments. This is particularly critical for Direct-to-Cell and Direct-to-IoT services where users depend on seamless connectivity across urban, rural, and maritime regions. The band’s availability for both commercial satellite communications and NTN standards under 3GPP further accelerates its adoption, as it aligns with the global expansion of 5G NTN. Additionally, many satellite operators and mobile network operators are prioritizing S-band deployments for emergency services, critical communications, and IoT sensor networks, driving their rapid market expansion during the forecast period.

“The L2 class is projected to grow at the fastest rate during the forecast period.”

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Based on latency class, the L2 segment is projected to witness the fastest growth as it offers an optimal trade-off between performance and cost for Direct-to-Device applications. While ultra-low latency (L1 class) is essential for highly critical use cases, the L2 class provides latency levels sufficient for mainstream applications such as messaging, IoT data transfer, location tracking, and emergency alerts, without the high infrastructure cost. This makes it highly attractive for both Direct-to-Cell and Direct-to-IoT services, where scaling to millions of devices is more important than sub-millisecond responsiveness. The growing adoption of L2 latency class is further supported by advancements in LEO constellations, which inherently reduce latency compared to GEO satellites, making services like mobile broadband augmentation and satellite-enabled IoT more accessible. As the demand for balanced performance grows across consumer and enterprise segments, the L2 class is projected to dominate adoption trends over the forecast period.

“The Rest of the World is expected to register the fastest growth during the forecast period.”

The Rest of the World (Africa and Latin America) is expected to register the fastest growth during the forecast period due to the increasing need for reliable connectivity with significant coverage gaps and limited terrestrial infrastructure. Both regions face large rural and underserved populations, making Direct-to-Cell (D2Cell) a cost-effective solution to extend voice, messaging, and internet services without heavy investments in ground networks. Direct-to-IoT (D2IoT) adoption is accelerating in agriculture, mining, logistics, and environmental monitoring, where satellite-based IoT solutions are essential for operational efficiency and resource management. Government initiatives to promote digital inclusion, coupled with rising private sector investments in space and telecom partnerships, are creating a conducive environment for rapid adoption. As affordability improves and localized use cases such as smart farming in Africa and supply-chain visibility in Latin America gain traction, these regions are poised to outpace others in growth, contributing significantly to the global expansion of the D2D market.

The breakdown of the profile of primary participants in the D2D market is as follows:

By Company Type: Tier 1 – 35%, Tier 2 – 45%, and Tier 3 – 20%

By Designation: Directors– 25%, Managers – 35%, Others – 40%

By Region: North America – 20%, Europe – 20%, Asia Pacific – 40%, Rest of the World-20%

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SpaceX (US), Iridium Communications Inc. (US), Globalstar (US), ORBCOMM (US), and Viasat (US) are the key players and offer connectivity applicable to various sectors and have well-equipped and strong distribution networks across North America, Europe, the Asia Pacific, the Middle East, and the Rest of the World.

Research Coverage:

The study covers the D2D market across various segments and subsegments. It aims to estimate the size and growth potential of this market across different segments based on service type, latency class, orbit, frequency, customer type, and region. This study also includes an in-depth competitive analysis of the key players in the market, along with their company profiles, key observations related to their solutions and business offerings, recent developments undertaken by them, and key market strategies adopted by them.

This report segments the D2D market across five key regions: North America, Europe, the Asia Pacific, the Middle East, and the Rest of the World, and their respective key countries. The report's scope includes in-depth information on significant factors, such as drivers, restraints, challenges, and opportunities that influence the growth of the D2D market.

A comprehensive analysis of major industry players has been conducted to provide insights into their business profiles, solutions, and services. This analysis also covers key aspects like agreements, collaborations, product launches, contracts, expansions, acquisitions, and partnerships associated with the D2D market.

Reasons to buy this report:

This report serves as a valuable resource for market leaders and newcomers in the Direct-to-Device (D2D) market, offering data that closely approximates revenue figures for both the overall market and its subsegments. It equips stakeholders with a comprehensive understanding of the competitive landscape, facilitating informed decisions to enhance their market positioning and formulate effective go-to-market strategies. The report imparts valuable insights into the market dynamics, offering information on crucial factors such as drivers, restraints, challenges, and opportunities, enabling stakeholders to gauge the market's pulse.

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The report provides insights into the following pointers:

Analysis of key drivers and factors, such as global coverage needs & coverage gaps, proliferation of IoT & connected devices, and increasing launches of satellites

Market Penetration: Comprehensive information on D2D solutions offered by the top players in the market

Product Development/Innovation: Detailed insights into upcoming technologies, research & development activities, and new service launches in the D2D market

Market Development: Comprehensive information about lucrative markets (the report analyzes the D2D market across various regions)

Market Diversification: Exhaustive information about services, untapped geographies, recent developments, and investments in the D2D market

Competitive Assessment: In-depth assessment of market shares, growth strategies, and service offerings of leading players in the D2D market

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