

M2M Satellite Communication Market by Offering (Hardware, Software Types, Services), Technology (Satellite Constellation (LEO, MEO, GEO), Data Transmission, VSAT, AIS), Vertical (Maritime, Military & Defense) and Region - Global Forecast to 2028

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Abstracts

The global M2M satellite communication market is valued at USD 15.5 billion in 2023 and is estimated to reach USD 28.7 billion in 2028, registering a CAGR of 13.1% during the forecast period. The growing demand for monitoring and remote management of connected devices stands as a pivotal market driver propelling the growth of M2M satellite communication. As the world becomes increasingly interconnected through the IoT, industries and enterprises are deploying a myriad of connected devices across diverse sectors, such as agriculture, healthcare, transportation, and manufacturing. This surge in connected devices necessitates efficient and reliable communication channels, especially in remote or inaccessible locations where traditional networks may be unreliable or unavailable. M2M satellite communication emerges as a solution to bridge these connectivity gaps, ensuring seamless data transmission and control over dispersed and geographically distant devices. The ability to monitor, track, and manage these devices remotely enhances operational efficiency, reduces downtime, and enables timely decision-making. Consequently, the growing reliance on M2M satellite communication to facilitate the connectivity and control of connected devices is steering the trajectory of the market, creating a robust and expanding ecosystem that addresses the evolving needs of a connected world.

“By offering, the hardware segment is projected to hold the largest market size during the forecast period.”

In the rapidly evolving field of M2M satellite communication, several companies are

actively engaged in offering comprehensive hardware solutions, including terminals, modems, and antennas. These components play a crucial role in enabling seamless connectivity and data transfer between remote devices and satellite networks; technology advances and hardware offerings in the M2M satellite communication market continue to evolve, with a focus on improving performance, reducing size and power consumption, and addressing the unique challenges associated with remote deployments. Companies in this sector often differentiate themselves through innovation, ensuring that their hardware solutions meet the demanding requirements of a broad range of M2M applications.

“By software type, Geospatial Analysis and mapping software is registered to grow at the highest CAGR during the forecast period.”

Geospatial analysis and mapping refer to specialized tools and applications designed to analyze, visualize, and interpret location-based data collected from satellite-connected devices. This software integrates geospatial information with data generated by M2M devices, offering a comprehensive view of spatial relationships, patterns, and trends. In the M2M context, where devices are often dispersed across vast and remote areas, geospatial analysis and mapping software provide valuable insights for applications such as environmental monitoring, precision agriculture, and logistics. It allows organizations to leverage satellite communication capabilities to track the geographical locations of devices, assess environmental conditions, and optimize decision-making processes based on spatial data.

“Asia Pacific is projected to witness the highest CAGR during the forecast period.”

The Asia-Pacific region is currently experiencing a notable surge in the military satellite communications (SATCOM) industry, with countries like Australia, India, Japan, and South Korea taking the lead in defense spending and the initiation of military SATCOM projects and programs. The growth potential in this sector is substantial, encompassing both the space and ground segments, including satellites, ground stations, and associated components and services. Partnerships, particularly between foreign and domestic companies, are crucial for expanding market presence. By supporting local supply chains and value networks, these collaborations foster an environment conducive to industry growth. The region's overall progress in infrastructure and technological capabilities, particularly in areas like 5G, reflects a broader embrace of the digital revolution across industries. Countries like Malaysia and Singapore are standing out in global rankings for 5G speed and performance, showcasing the region's commitment to technological advancement in various sectors, including defense and

military communications.

Breakdown of primaries

In-depth interviews were conducted with Chief Executive Officers (CEOs), innovation and technology directors, system integrators, and executives from various key organizations operating in the M2M satellite communication market.

By Company: Tier I: 35%, Tier II: 45%, and Tier III: 20%

By Designation: C-Level Executives: 35%, Directors: 25%, and Others: 40%

By Region: North America: 45%, Europe: 20%, Asia Pacific: 30%, RoW: 5%

Major vendors offering M2M satellite communication hardware, software and services across the globe are Marlink (France), Viasat (US), Thales (France), ORBCOMM (US), Iridium Communications (US), Globalstar (US), Orange (France), EchoStar (US), Intelsat (US), Rogers Communications (Canada), SES (Luxembourg), Gilat (Israel), Telia (Sweden), Kore Wireless (US), Honeywell (US), Qualcomm (US), Telesat (Canada), Wireless Logic (England), Outerlink Global Solutions (US), Nupoint Systems (Canada), Businesscom Networks (US), Semtech (US), Yahsat (UAE).

Research Coverage

The market study covers M2M satellite communication across segments. It aims at estimating the market size and the growth potential across different segments, such as offering, technology, vertical, and region. It includes an in-depth competitive analysis of the key players in the market, along with their company profiles, key observations related to product and business offerings, recent developments, and key market strategies.

Key Benefits of Buying the Report

The report would provide the market leaders/new entrants in this market with information on the closest approximations of the revenue numbers for the overall market for M2M satellite communication and its subsegments. It would help stakeholders understand the competitive landscape and gain more insights better to position their business and plan suitable go-to-market strategies. It also helps stakeholders

understand the pulse of the market and provides them with information on key market drivers, restraints, challenges, and opportunities.

The report provides insights on the following pointers:

Analysis of key drivers (Rising need for enriched data communication, The surge in IoT proliferation drives the demand for M2M satellite communication, The escalating demand for monitoring and remote management of connected devices boosts the market), restraints (Limited bandwidth and latency issues and Cost constraints hinder the widespread adoption of M2M satellite communication), opportunities (Conjunction of satellite and terrestrial mobile technology, To enhance global connectivity in remote areas), and challenges (Growing security concerns and Interference and signal quality issues pose a challenge for M2M satellite communication) influencing the growth of the M2M satellite communication market

Product Development/Innovation: Detailed insights on upcoming technologies, research & development activities, and new product & service launches in the M2M satellite communication market.

Market Development: Comprehensive information about lucrative markets – the report analyses the M2M satellite communication market across varied regions.

Market Diversification: Exhaustive information about new products & services, untapped geographies, recent developments, and investments in M2M satellite communication market strategies; the report also helps stakeholders understand the pulse of the M2M satellite communication market and provides them with information on key market drivers, restraints, challenges, and opportunities.

Competitive Assessment: In-depth assessment of market shares, growth strategies and service offerings of leading players such as Viasat (US), Thales (France), Rogers Communications (Canada), EchoStar (US) and SES (Luxembourg) among others in the M2M satellite communication market.

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*Details on Business Overview, Products/Solutions/Services offered, Recent Developments, MnM View might not be captured in case of unlisted companies.

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About

M2M connectivity is experiencing a huge growth in the satellite communication market. The M2M market represents an enormous opportunity for the satellite industry. The satellite covers the earth, and can deliver communications anywhere on land, sea, and in the air. There are still many areas on the planet that are not covered by the terrestrial communications, and still require M2M. Thus, satellite provides the ideal solutions. However, when it comes to consideration of technology, in order to develop applications, there is a lot of reluctance in choosing the technology related to the satellite because of not enough penetration regarding satellite based technologies.

In the M2M satellite communication market, a very specialized technology related to satellite communications are discussed which includes satellite telemetry, VSAT, and AIS. The communication and network devices are very crucial for the transfer of the information to the end user.

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The global M2M satellite communication market is estimated to grow at a Compound Annual Growth Rate (CAGR) of XX% during the forecast period 2014-2019. Increasing adoption of M2M applications by individual users and enterprises, increasing data communication need, high Return on Investment (ROI) in the industry are the major drivers for this market.

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