

Satellite Communication (SATCOM) Equipment Market by Solution (Products and Services), Platform (Portable, Land Mobile, Land Fixed, Maritime), Technology (SOTM/COTM, SOTP), Vertical, Connectivity, Frequency and Region - Forecast to 2028

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Abstracts

The SATCOM equipment market is valued at USD 22.6 billion in 2023 and is projected to reach USD 38.7 billion by 2028, at a CAGR of 11.3% from 2023 to 2028. Over the last few decades, the SATCOM industry has continued to evolve with expanding use cases, better cost efficiencies, and a more significant impact on bridging the digital divide worldwide. A single VSAT platform that can deliver all of a network operator's services is a valuable commodity, particularly as VSAT communications grow in scope in markets, including mobility, backhaul, consumer, and enterprise. In August 2021, Gilat Satellite Networks developed the multi-application SkyEdge II-c platform. This high-performance platform enables satellite service providers to support any market.

Satellites provide a host of voice, data, and broadcast solutions that wouldn't have been possible in the 20th century. This convergence drives increased network demands to deliver uninterrupted availability, reliability, and security. And, as more mission-critical applications become dependent on the network, tolerance for network problems approaches zero.

The market is being propelled by various factors, including the increasing demand for broadband connectivity, the expansion of cellular networks' coverage, the rising need for IoT connectivity, and the growing investments by governments in satellite communication infrastructure. These factors drive the adoption of advanced satcom

equipment that can operate across multiple frequency bands, providing higher data rates, improved efficiency, and enhanced reliability. The advent of high-throughput satellites (HTS) is revolutionizing the satcom equipment market by offering significantly higher data rates and capacity than traditional satellites. HTS systems utilize spot beams to concentrate bandwidth over specific geographic areas, enabling the delivery of a wide range of applications and services such as broadband internet, video streaming, and enterprise networks.

Another noteworthy trend in the market is the integration of satcom equipment with terrestrial networks like 5G and 6G. This integration allows for seamless connectivity and enhances network resilience, leveraging the strengths of both satellite and terrestrial communication systems. Leading players in the satcom equipment market are making substantial investments in research and development to introduce advanced technologies such as GaAs and Gallium RF technology to improve performance, efficiency, and reliability. They also focus on partnerships and collaborations to expand their market presence and provide comprehensive solutions to customers.

Based on frequency, the multiband frequency is projected to register the highest during the forecast period 2023-2028.

Based on frequency, the SATCOM equipment market has been segmented into C band, L&S band, X band, Ka band, Ku band, VHF/UHF band, EHF/SHF band, Multiband, and Q band. Based on frequency, the multiband frequency is projected to register the highest CAGR during the forecast period 2023-2028. Multi-band frequency is being increasingly used due to the need for seamless, assured connectivity between the network and grid.

Based on connectivity, MEO/GEO orbit segment is to lead the market during the forecast period 2023-2028

The SATCOM equipment market has been segmented based on connectivity into LEO and MEO/GEO orbit. MEO/GEO orbit segment to lead the market during the forecast period 2023-2028. MEO high throughput satellites are challenging GEO satellites in cost per bit and overall operational efficiency. Several advantages, including the low manufacturing cost of smaller satellites used in prominent constellations, provide a viable commercial option for large GEO satellites for communication. Moreover, closer positioning to Earth's surface makes these satellites effective in the coverage of data connections. In February 2023, Marlink was awarded a Public Service Delegation contract to deploy broadband Internet and 4G/5G services via satellite networks,

covering both urban and rural areas in French Guiana. In a 15-year agreement, Marlink and SES will leverage SES's multi-orbit geostationary (GEO) and Medium Earth Orbit (MEO) satellite network to provide high-speed services to over 30,000 users across the French region.

The North American market is projected to contribute the most significant share from 2023 to 2028 in the SATCOM equipment market.

North America is expected to lead the SATCOM equipment market from 2023 to 2028 based on region. The North American part, particularly the US, presents a highly profitable need for SATCOM equipment. The US government has been actively investing in SATCOM to improve the quality and efficiency of satellite communication. The escalating investment in SATCOM equipment aims to enhance the defense and surveillance capabilities of the armed forces, modernize communication systems in military platforms, and support critical infrastructure and law enforcement agencies. These factors play a significant role in driving the growth of the SATCOM equipment market in North America. Prominent players from this region include L3Harris Technologies (US), Honeywell International Inc. (US), EchoStar Corporation (US), Viasat, Inc. (US), and others.

The break-up of the profile of primary participants in the SATCOM equipment market:

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

By Designation: C Level – 35%, Director Level – 25%, and Others – 40%

By Region: North America – 40%, Europe – 30%, Asia Pacific – 20%, Middle East & Africa – 5%, Latin America – 5%

Major companies profiled in the report include EchoStar Corporation (US), L3Harris Technologies (US), Thales Group (France), Raytheon Technologies Corporation (US), and General Dynamics Corporation (US), among others.

Research Coverage:

This market study covers the SATCOM equipment market across various segments and subsegments. It aims to estimate this market's size and growth potential across different parts based on solutions, verticals, technology, connectivity, frequency, platform, and

region. This study also includes an in-depth competitive analysis of the key players in the market, their company profiles, key observations related to their product and business offerings, recent developments, and key market strategies they adopted.

Reasons to buy this report:

The report will help the market leaders/new entrants with information on the closest approximations of the revenue numbers for the overall SATCOM equipment market. This report will help stakeholders understand the competitive landscape and gain more insights to position their businesses better and plan suitable go-to-market strategies. The report also helps stakeholders understand the market pulse and provides information on key market drivers, restraints, challenges, and opportunities. The growth of the market can be attributed to the increasing launch of low earth orbit (LEO) satellites and constellations of satellites for communications applications, increasing usage of ESPA Antenna, and Increasing demand for customized SATCOM-on-the-Move solutions for unmanned ground vehicles.

The report provides insights on the following pointers:

Market Penetration: Comprehensive information on SATCOM equipment offered by the top players in the market

Product Development/Innovation: Detailed insights on upcoming technologies, research & development activities, and new product launches in the SATCOM equipment market

Market Development: Comprehensive information about lucrative markets – the report analyses the SATCOM equipment market across varied regions

Market Diversification: Exhaustive information about new products, untapped geographies, recent developments, and investments in the SATCOM equipment market

Competitive Assessment: In-depth assessment of market shares, growth strategies, products, and manufacturing capabilities of leading players in the SATCOM equipment market

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