

Malaysia Telecom - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts (2024 - 2029)

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Abstracts

The Malaysia Telecom Market size is estimated at USD 9.08 billion in 2024, and is expected to reach USD 11.08 billion by 2029, growing at a CAGR of 4.07% during the forecast period (2024-2029).

The telecom sector in Malaysia is anticipated to expand primarily due to the country's growing urban population and the widespread use of cell phones that enable 3G, 4G, and 5G services. The Internet of Things (IoT), which connects with wired and wireless internet, is predicted to be used significantly in the telecom industry throughout the forecast period, propelling the sector's expected growth.

According to GSMA Intelligence, 44.5 million cellular mobile connections were in Malaysia at the beginning of 2024. Mobile connections in Malaysia amounted to 129.2% of the total population in January 2024. Between 2023 and 2024, the number of mobile connections in Malaysia increased by 169 thousand (+0.4%).

Key Highlights

According to ITU, the number of mobile cellular subscriptions per 100 inhabitants in Malaysia was 141.3 in 2022. Such a considerable rise in mobile connections would create lucrative growth opportunities for the market studied.

As 5G technology offers faster data speeds and lower latency than other mobile networks, the demand for 5G connection and services is growing in the country. 5G connectivity provides seamless streaming, faster downloads, and real-time communication, driving the demand for telecom services in the country. The growing popularity of video streaming, online gaming, and other data-intensive applications

drives the demand for higher data speeds and capacity. With 5G, telecom operators can meet this increasing demand for mobile data consumption, resulting in higher revenue opportunities in the market.

The telecom industry in the country has been utilizing IoT technologies in various ways. Internally, the industry is using it to increase efficiencies and resource utilization. On the customer-facing side, IoT helps telecom businesses track and predict information, informing customers of what to expect and keeping them up-to-date. Asset management and remote system monitoring are the most common IoT telecom use cases. Telecom operators provide connectivity services to customers with their IoT devices. The telecom industry can monetize its data and extend its reach through IoT.

The emergence of stiff competition in the Malaysian telecom market poses several challenges. It can lead to price wars, which may erode profit margins for telecom companies. Companies may need to invest more in marketing and customer retention efforts to maintain their market share. Intense competition can drive innovation and quality improvements, but it can also strain resources and lead to market saturation. Therefore, navigating this competitive landscape requires strategic agility and a focus on delivering value to customers.

Digital Nasional Bhd (DNB) has announced, in a statement, that its 5G network is ahead of schedule and will exceed the 40% range of populated areas (COPA) nationwide by December 2022 and is on track to achieve the devoted 80% COPA by 2024 or earlier. The 40% COPA would be executed with approximately 3,500 sites against an originally scheduled 4,018 sites. DNA explains that this reduced site count is a consequence of supply chain issues and delays in securing local council approvals, primarily in Selangor and Sarawak.

Malaysia Telecom Market Trends

Rising Demand for 5G Drives the Market's Growth

The deployment of 5G networks can contribute to economic growth and enhance a country's competitiveness, attracting investments, supporting innovation, and driving productivity gains across various sectors. As a result, there is a strong focus on expanding 5G infrastructure in Malaysia to promote economic development and stay competitive on a global scale.

In recent years, Malaysia has been actively promoting the development of its digital

economy. The government launched several initiatives, such as the Digital Free Trade Zone (DFTZ) and the Malaysia Digital Hub, to attract foreign investment and foster local tech startup growth. These initiatives helped create a vibrant and dynamic tech ecosystem in Malaysia, with a growing number of innovative startups and established tech companies.

The Malaysian government created the MyDIGITAL program as part of the Malaysian Economic Digital Economy Plan to promote this broad-based ambition. The government aims to make Malaysia a high-income, digitally-driven nation in the digital economy by 2030. Malaysia intends to reinforce its position as a regional data hub via the government's Cloud First plan under the MyDIGITAL framework, embracing investments in data centers.

Telecom network operators must compete with other players who can be key partners in providing solutions. Operators are taking steps within their organizations to assess and mitigate threats posed by 5G and software-centric networks, providing 5G security services to companies deploying advanced wireless networks. According to OpenSignal, Malaysia's average 5G download speed in 2023 is 322.7 Mbps.

In the new era, consumers will have more options for purchasing and using services as the availability of high-quality communications and internet services from telecommunications, cable, wireless, and satellite internet providers expands.

Overall, government initiatives related to digital transformation and 5G investments by players operating in the Malaysian market, owing to the rising adoption of 5G, are driving the growth of the telecom market in the country.

Data and Messaging Services Segment Holds Significant Market Share

The country's data and messaging services sector includes the internet, text messages, etc., from both the fixed and mobile networks. This sector is rising in Malaysia due to the adoption of 5G services, fiber-based optical fixed internet connection, etc.

Telecom providers are forming partnerships, getting licensing agreements, expanding fiber and copper-based network infrastructure, and deploying 5G services in the country to support the increasing demand for data and messaging services in the country.

For instance, in July 2023, Hotlink launched an enhanced prepaid plan that combines features from the popular Hotlink Unlimited and Hotlink Pantas plans. This new Hotlink Prepaid Plan offers increased value, flexibility, and more internet pass options. Additionally, Hotlink is providing 20% cashback vouchers for people who purchase new internet passes during the launch.

The digitalization of business processes, such as using internet-based services in BFSIs, governments, retail, manufacturing, healthcare, etc., in the country, is creating a demand for telecom service providers' data services across industries and the people to use digital services which include internet data packages for both prepaid and post-paid data services. In addition, vendors in the market are expanding their data service offering packages to support the market growth in Malaysia.

The market studied has been witnessing acquisitions, investments, and collaborations among the telecom providers to increase their market presence in mobile and fixed data services, which shows the market potential for the data and messaging services segment in the country.

For instance, in August 2023, Maxis launched its highly anticipated range of new plans with 5G services. The upgraded plans come with more than double the data for both 4G and 5G, as well as additional bonus data for 5G. The plans are designed to meet the increasing digital needs of both consumers and businesses, especially for video content consumption and productivity tools.

Therefore, the expansion of the optical fiber network, deployment of mobile internet networks such as 4G and 5G, and the need for high-speed data and messaging services across industry verticals and retail consumers to support the country's digitalization strategy are fueling the market for data and messaging services in the telecom sector of the country.

According to StatCounter, as of May 20, apart from Apple, more and more Android-based smartphones were able to expand their market share over the past few years. The Android market has evolved to become more open, and trust in well-selected brands has shrunk. In addition, lesser-known smartphone brands like Oppo have dominated the market with low-priced smartphones to meet the demand of smaller-income people.

Malaysia Telecom Industry Overview

The Malaysian telecom market is semi-consolidated, with major players like YTL Communications Sdn Bhd, Ansar Mobile (Redtone Digital Berhad), Celcomdigi Berhad, Maxis Berhad, and ONE XOX Sdn Bhd (XOX Sdn Bhd). Market players are adopting strategies such as partnerships and acquisitions to enhance their product offerings and gain sustainable competitive advantage.

April 2024 - U Mobile Sdn Bhd launched its first store in East Malaysia located at Imago Shopping Mall, Kota Kinabalu, Sabah. The move highlighted the telco's continuing efforts to expand reach further and enhance customer engagement in the state. The full-service store is poised to provide customers with the complete range of U Mobile's offerings and mobile digital experiences, such as an exclusive gaming corner for customers to test the power of U Mobile 5G.

December 2023 - XOX Com entered into a Memorandum of Understanding (MoU) to discuss and explore business cooperation between the two parties, especially in the field of white-label mobile services, and to improve the digital lives of students from higher education institutions of Malaysia under the MYSISWA Program, particularly students from the UCSI University.

Additional Benefits:

The market estimate (ME) sheet in Excel format

3 months of analyst support

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