

5G Ntn Market Outlook 2025-2034: Market Share, and Growth Analysis By Component (Hardware, Solutions, Services), By Platform (LEO Platform, GEO Platform, MEO Platform, Other Platforms), By Application, By End-User

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Abstracts

The 5G Ntn Market is valued at USD 8.4 billion in 2025 and is projected to grow at a CAGR of 23.1% to reach USD 54.7 billion by 2034. The 5G Non-Terrestrial Network (NTN) market is an emerging sector focused on extending 5G connectivity to areas beyond the reach of traditional terrestrial networks. This market involves the deployment of 5G networks using satellites, high-altitude platforms (HAPs), and other non-terrestrial platforms. 5G NTN is crucial for providing connectivity in remote and underserved areas, as well as for enabling critical applications such as disaster recovery and maritime communications.

The market is characterized by rapid innovation in satellite communications, aerospace engineering, and network virtualization. The development of advanced satellite constellations, such as low Earth orbit (LEO) satellites, is driving the market forward. The integration of 5G technologies with satellite networks is also enabling seamless connectivity between terrestrial and non-terrestrial networks. Furthermore, the increasing adoption of network function virtualization (NFV) and software-defined networking (SDN) is enabling greater flexibility and scalability in 5G NTN deployments.

Geographically, the 5G NTN market is expanding globally, with significant activity in regions with remote or underserved areas. Developed regions are leading the way in technology development, driven by their investments in space exploration and telecommunications infrastructure. Emerging economies are also showing increasing interest in 5G NTN, driven by the need to bridge the digital divide and provide

connectivity to remote populations. The market's future is promising, with continuous innovation and increasing adoption expected to drive significant growth.

Key Insights 5G Ntn Market

LEO Satellite Constellations: Increasing deployment of LEO satellite constellations for global coverage.

5G Integration with Satellite Networks: Seamless integration of 5G technologies with satellite networks.

Network Virtualization: Adoption of NFV and SDN for flexible and scalable 5G NTN deployments.

Hybrid Terrestrial-NTN Networks: Combining terrestrial and non-terrestrial networks for seamless connectivity.

Direct-to-Device Connectivity: Enabling direct connectivity between 5G devices and satellites.

Remote Area Connectivity: Need for connectivity in remote and underserved areas.

Disaster Recovery: Use of 5G NTN for communication during natural disasters.

Maritime and Aviation Communications: Providing connectivity for maritime and aviation applications.

Global Coverage: Desire for global connectivity beyond the reach of terrestrial networks.

IoT Connectivity: Enabling IoT connectivity in remote and challenging environments.

Latency Issues: Managing latency in satellite communications.

Spectrum Availability: Securing dedicated spectrum for 5G NTN.

Interference Issues: Potential for interference between terrestrial and non-terrestrial networks.

Cost of Deployment: High cost of deploying satellite and HAP infrastructure.

Regulatory Issues: Regulatory issues related to satellite communications and spectrum allocation.

5G Ntn Market Segmentation

By Component

Hardware

Solutions

Services

By Platform

LEO Platform

GEO Platform

MEO Platform

Other Platforms

By Application

Enhanced Mobile Broadband (eMBB)

Ultra-Reliable Low-Latency Communication (URLLC)

Massive Machine-Type Communications (mMTC)

By End-User

Maritime

Aerospace And Defense

Government

Mining

Other End-Users

Key Companies Analysed

Anritsu Corporation

AST and Science LLC

GateHouse SatCom A/S

Globalstar Inc.

Gilat Satellites Network

EchoStar Corporation

Media Tek Inc.

Nelco Limited

Inmarsat Global Limited

Nokia Corporation

OneWeb Network Access Associates Limited

Qualcomm Technologies Inc.

Intelsat LLC

Rhode and Schwarz GmbH

Keysight Technologies Inc.

Omnispace LLC

Telefonaktiebolaget LM Ericsson

Thales Group

SoftBank Group Corporation

SES S.A.

ZTE Corporation

Spirent Communications

BAE Systems plc

Cobham plc

General Dynamics Corporation

Harris Corporation

Honeywell International Inc.

Lockheed Martin Corporation

Northrop Grumman Corporation

Raytheon Technologies Corporation

Safran S.A.

Airbus SE

Boeing Company

Bombardier Inc.

Embraer S.A.

General Electric Company

Rolls-Royce Holdings plc

5G Ntn Market Analytics

The report employs rigorous tools, including Porter's Five Forces, value chain mapping, and scenario-based modeling, to assess supply–demand dynamics. Cross-sector influences from parent, derived, and substitute markets are evaluated to identify risks and opportunities. Trade and pricing analytics provide an up-to-date view of international flows, including leading exporters, importers, and regional price trends.

Macroeconomic indicators, policy frameworks such as carbon pricing and energy security strategies, and evolving consumer behavior are considered in forecasting scenarios. Recent deal flows, partnerships, and technology innovations are incorporated to assess their impact on future market performance.

5G Ntn Market Competitive Intelligence

The competitive landscape is mapped through OG Analysis' proprietary frameworks, profiling leading companies with details on business models, product portfolios, financial performance, and strategic initiatives. Key developments such as mergers & acquisitions, technology collaborations, investment inflows, and regional expansions are analyzed for their competitive impact. The report also identifies emerging players and innovative startups contributing to market disruption.

Regional insights highlight the most promising investment destinations, regulatory landscapes, and evolving partnerships across energy and industrial corridors.

Countries Covered

North America — 5G Ntn market data and outlook to 2034

United States

Canada

Mexico

Europe — 5G Ntn market data and outlook to 2034

Germany

United Kingdom

France

Italy

Spain

BeNeLux

Russia

Sweden

Asia-Pacific — 5G Ntn market data and outlook to 2034

China

Japan

India

South Korea

Australia

Indonesia

Malaysia

Vietnam

Middle East and Africa — 5G Ntn market data and outlook to 2034

Saudi Arabia

South Africa

Iran

UAE

Egypt

South and Central America — 5G Ntn market data and outlook to 2034

Brazil

Argentina

Chile

Peru

** We can include data and analysis of additional countries on demand.*

Research Methodology

This study combines primary inputs from industry experts across the 5G Ntn value chain with secondary data from associations, government publications, trade databases, and company disclosures. Proprietary modeling techniques, including data triangulation, statistical correlation, and scenario planning, are applied to deliver reliable market sizing and forecasting.

Key Questions Addressed

What is the current and forecast market size of the 5G Ntn industry at global, regional, and country levels?

Which types, applications, and technologies present the highest growth potential?

How are supply chains adapting to geopolitical and economic shocks?

What role do policy frameworks, trade flows, and sustainability targets play in shaping demand?

Who are the leading players, and how are their strategies evolving in the face of global uncertainty?

Which regional “hotspots” and customer segments will outpace the market, and what go-to-market and partnership models best support entry and expansion?

Where are the most investable opportunities—across technology roadmaps, sustainability-linked innovation, and M&A—and what is the best segment to invest over the next 3–5 years?

Your Key Takeaways from the 5G Ntn Market Report

Global 5G Ntn market size and growth projections (CAGR), 2024-2034

Impact of Russia-Ukraine, Israel-Palestine, and Hamas conflicts on 5G Ntn trade, costs, and supply chains

5G Ntn market size, share, and outlook across 5 regions and 27 countries, 2023-2034

5G Ntn market size, CAGR, and market share of key products, applications, and end-user verticals, 2023-2034

Short- and long-term 5G Ntn market trends, drivers, restraints, and opportunities

Porter’s Five Forces analysis, technological developments, and 5G Ntn supply chain analysis

5G Ntn trade analysis, 5G Ntn market price analysis, and 5G Ntn supply/demand dynamics

Profiles of 5 leading companies—overview, key strategies, financials, and products

Latest 5G Ntn market news and developments

Additional Support

With the purchase of this report, you will receive

An updated PDF report and an MS Excel data workbook containing all market tables and figures for easy analysis.

7-day post-sale analyst support for clarifications and in-scope supplementary data, ensuring the deliverable aligns precisely with your requirements.

Complimentary report update to incorporate the latest available data and the impact of recent market developments.

** The updated report will be delivered within 3 working days*

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