

5G Non-Terrestrial Networks Market – Global Industry Size, Share, Trends, Opportunity, and Forecast, 2018-2028F Segmented By Component Type (Hardware, Solutions, Services), By Platform (Unidentified Aerial System (UAS) Platform, Low-Earth Orbit (LEO) Satellite, Medium Earth Orbit (MEO) Satellite, Geosynchronous Equatorial Orbit (GEO) Satellite), By Application (Enhanced Mobile Broadband (EMBB), Ultra Reliable Low Latency Communications (URLLC), Massive Machine Type Communications (MMTC)), By Location (Urban, Rural, Remote, Isolated), By End User (Aerospace & Defense, Government, IT & Telecom, Mining, Maritime, Others), By Region, Competition

<https://marketpublishers.com/r/522B35D2E918EN.html>

Date: October 2023

Pages: 189

Price: US\$ 4,900.00 (Single User License)

ID: 522B35D2E918EN

Abstracts

Global 5G Non-Terrestrial Networks Market is predicted to grow during the forecast period due to the rising need for improved network in different locations, especially in developing countries by enterprises to overcome the growing connectivity issues with the development of more enhanced terrestrial networks. 5G Non-Terrestrial Networks can help organizations provide communication and internet access for spacecraft and other vehicles in space. Non-terrestrial networks have the capability of providing reliable connectivity to areas which were previously difficult to connect, transforming economies. By integrating the 5G in non-terrestrial networks, organizations can reduce network

costs, increase markets, and improve multi-connectivity. Additionally, excessive coverage expansion and increasing machine learning (ML) in 5G Non-Terrestrial Networks are increasing the demand for global 5G Non-Terrestrial Networks Market. In an effort to spread the network connectivity in the remote areas, businesses are increasingly utilizing 5G Non-Terrestrial Network services to provide effective coverage and capacity where needed and to ensure service continuity in case of failure or disaster. Furthermore, the growing innovation and strategic development in 5G Non-Terrestrial Networks are expected to enhance the features of 5G Non-Terrestrial Networks. This, in turn, is expected to drive market growth during the forecast period.

Non-Terrestrial Networks NTN refers to the networks that provide connection through satellite, airborne platforms like airships and balloons, and UAS (unmanned aircraft system) platforms, which also include UAVs (unmanned aerial vehicles) like drones. 5G Non-Terrestrial Networks (NTN) refers to the integration of 5G system in Non-Terrestrial Networks. The 5G Non-Terrestrial Networks, an integrated solution for terrestrial cellular networks and satellite networks that complies with 3GPP (Third Generation Partnership Project) standards, enables the construction of large terminal and application scales, lowers the cost of satellite connections, and achieves coverage of the sky and sea level. Satellite-based Non-Terrestrial Network (NTN) provides 5G services using transparent payload and regenerative payload architecture. NTN enables delivery services in areas lacking network infrastructure or availability during natural disasters. One of the main benefits of 5G NTN is multi-connectivity. The terrestrial links handling low-latency traffic and the satellite ones carrying high-latency traffic are enabling customers to connect through terrestrial and satellite links. By the use of current terrestrial networks and cellular industry economies of scale, 5G NTN technology contributes to better service dependability all around the world and makes fast and dependable 5G connection considerably more accessible in unserved and underserved places.

3GPP Evolution Toward NTN Inter-working and Integration

Traditionally, Non-terrestrial networks (NTNs) are often employed for a specific limited purpose, such as TV transmission and communication support during emergency situations. NTNs have still grown in significance over the past several years and will continue to offer new applications and services because of technology advancements and inclusion into the 5G 3GPP standards. Unmanned aerial systems (UASs), high-altitude platform stations (HAPSs), and low-Earth orbit (LEO) satellites are being incorporated by 3GPP standardization as non-terrestrial elements (NTEs) in the NTNs of the terrestrial 5G standard. Traffic jams, processing power, Oscillation, Altitude, and pitch can cause latency and packet loss, which can impact the performance of 5G NTN.

It is challenging to dynamically configure the ideal connection depending on the necessary service to effectively guide the antenna beam or schedule the user equipment (UE). In order to overcome the situation, enterprises are integrating the machine learning (ML) techniques for managing NTN connectivity as well as to improve service performance. Moreover, nowadays 3GPP has started standardization linked to 5G accelerated systems due to the requirement for the continued growth of 5G networks by embracing innovative verticals and use cases. Furthermore, the evolution in 3rd Generation Partnership Project (3GPP) standards for the on-going mobile communications systems is aiding in advancing the non-terrestrial network. Therefore, the 3GPP evolution toward NTN inter-working and integration is propelling the growth of global 5G Non-Terrestrial Networks market in the forecast period.

Growing Innovation and Strategic Developments

The recent growing innovations and development in network applications by several enterprises have advanced the means of Non-Terrestrial Networks (NTN) for seamless network connectivity. New advances in 5G standards are creating opportunities to integrate non-terrestrial networks (NTN) into an interoperable, standardized wireless experience. This continuous advancement in the technologies is increasing the market growth with a significant pace in the recent years. For instance, Key Technologies Inc. a U.S based technology company that provides cutting-edge design and validation solutions to connect and began collaborating in January 2023 with Qualcomm Technologies Inc. to launch an end-to-end NTN connection. Furthermore, on February 2023, STC Group, a digital enabler in the Middle East and Africa region, and Omnispace, the company dealing with mobile connectivity for the 21st century, announced the Memorandum of Understanding (MoU) to develop space-based 5G mobile communications voice and data services. The company is planning to leverage the Omnispace 3GPP-compliant 5G Non-Terrestrial Network (NTN), offering customers cost-effective global connectivity beyond its existing cellular land-based network. Such developments are enabling inclusion of underserved regions, offering customers seamless, direct-to-device, mobile communications connectivity across the Kingdom of Saudi Arabia. Thus, growing innovation and strategic development are driving the growth of global 5G Non-Terrestrial Networks market in the forecast period.

Rising Need for Better Network in Different Locations

Despite the prominence of modernization in the era of 21st Century, many remote areas along with the rural areas still does not have or are unconnected with the fast network connectivity and advanced infrastructure. This has become a key barrier for many

enterprises and the consumers to involve in market trade for many smart devices and the products with require the better network. With the increasing digitalization and the proliferation of smart connected devices, almost every country is seeking the need for fast network connectivity. With the help of employing the latest generation of networks and satellite technology, the defense, government, aerospace, and commercial industries as well as individuals would be able to connect and communicate with remote parts of the globe where terrestrial networks do not operate. The 5G satellite communication technology offers a cost-effective broadband and wireless connectivity in the unconnected and remote areas across the globe. Although several enterprises such as Samsung Electronics Co., Ltd, Nokia Corporation are taking initiatives in standardizing the 5G non-terrestrial networks (NTN) modern technology for the different locations. On the contrary, there is still a lack of better network connectivity in many remote locations. For instance, according to the government of India, Ministry of Communication, over 25,000 villages out of 0.597 million villages lacked the internet connectivity in 2021, while Odisha has the maximum number of villages without mobile or internet. Furthermore, non-terrestrial networks with respect to 5G are enabling the better network services. Moreover, the organizations can now embrace the complete range of network connectivity with the adoption of non-terrestrial networks systems for network connectivity. Therefore, rising need for better network in different locations is attributing to the growth of 5G Non-Terrestrial Networks in the global market.

Market Segmentation

The Global 5G Non-Terrestrial Networks market is segmented into component type, platform, application, location, end user, region and competitive landscape. Based on component type, the market is segmented into Hardware, Solutions and Services. Based on platform, the market is divided into unidentified aerial system (UAS) platform, low-earth orbit (LEO) satellite, medium earth orbit (MEO) satellite, geosynchronous equatorial orbit (GEO) satellite. Based on application, the market is segmented into enhanced mobile broadband (EMBB), ultra reliable low latency communications (URLLC) and massive machine type communications (MMTC). Based on Location, the market is divided into urban, rural, remote, and isolated. Based on end user, the market is segmented into aerospace & defense, government, IT & Telecom, mining, maritime and others.

Company Profiles

Qualcomm Technologies Inc., Thales Group, Softbank Group Corporation, Keysight Technologies Inc., MediaTek Inc., ZTE Corporation, Anritsu Corporation, Rohde &

Schwarz GmbH & Co KG, Omnispace LLC, and EchoStar Corporation are among the major players that are driving the growth of the Global 5G Non-Terrestrial Networks Market.

Report Scope:

In this report, the Global 5G Non-Terrestrial Networks Market has been segmented into the following categories, in addition to the industry trends which have also been detailed below:

5G Non-Terrestrial Networks Market, By Component Type:

Hardware

Solutions

Services

5G Non-Terrestrial Networks Market, By Platform:

Unidentified Aerial System (UAS) Platform

Low-Earth Orbit (LEO) Satellite

Medium Earth Orbit (MEO) Satellite

Geosynchronous Equatorial Orbit (GEO) Satellite

5G Non-Terrestrial Networks Market, By Application:

Enhanced Mobile Broadband (EMBB)

Ultra Reliable Low Latency Communications (URLLC)

Massive Machine Type Communications (MMTC)

5G Non-Terrestrial Networks Market, By Location:

Urban

Rural

Remote

Isolated

5G Non-Terrestrial Networks Market, By End User:

Aerospace & Defense

Government

IT & Telecom

Mining

Maritime

Other

Global 5G Non-Terrestrial Networks Market, By Region:

Asia-Pacific

China

Japan

India

Australia

South Korea

North America

United States

Canada

Mexico

Europe

United Kingdom

Germany

France

Spain

Italy

Middle East & Africa

Qatar

South Africa

Saudi Arabia

UAE

South America

Brazil

Argentina

Colombia

Competitive Landscape

Company Profiles: Detailed analysis of the major companies present in the global 5G Non-Terrestrial Networks market.

Available Customizations:

With the given market data, TechSci Research offers customizations according to a company's specific needs. The following customization options are available for the report:

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Detailed analysis and profiling of additional market players (up to five).

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