

Satellite Communication Terminal Market Forecast to 2028 - COVID-19 Impact and Global Analysis by Classification (C Band, X Band, S Band, Ku Band, and Ka Band), Application (Military Use and Civil Use), and Satellite Type (GEO, MEO, and LEO)

<https://marketpublishers.com/r/S0B712678F0AEN.html>

Date: June 2023

Pages: 150

Price: US\$ 4,550.00 (Single User License)

ID: S0B712678F0AEN

Abstracts

The satellite communication terminal market size was valued at US\$ 4.1 billion in 2022 and it is expected to reach US\$ 6.0 billion by 2028; it is estimated to record a CAGR of 7.3% from 2023 to 2028.

The satellite communication terminal market is growing because of the battlefield, the rise in public safety, and the desire for a reliable network during emergencies. The growth of the OTT platforms and IPTV are other factors responsible for the growth of the satellite industry, which in turn, promotes SATCOM communication and SATCOM communication hardware such as terminals. However, the market's growth is hampered by high implementation costs, restricted data transit capabilities, and limited spectrum bandwidth. On the other hand, government investments in mission-critical communication systems in the defense sector are likely to generate attractive prospects for the industry in the coming years.

Downlink satellite transmissions using C-band frequencies provide a wide range of services in developed and developing countries, including critical applications such as distance learning, telemedicine, and universal access services; backhaul services (telephony, Internet); very small aperture terminal (VSAT) data links such as bank transactions or corporate networks; television program distribution; mobile-satellite service feeder links; and emergency. These services necessitate the high reliability and wide geographic coverage that only the C-band can provide. The C-band satellite beams cover a broad area, making transcontinental and global communications easier.

To combat the more severe signal attenuation caused by atmospheric influences at higher frequencies, such as about 12 GHz (Ku-band) or 20 GHz (Ka-band), beams are more targeted toward smaller areas. C-band beams enable economically viable coverage of smaller markets and locations with low population density because of their wide geographic reach. Because rain fade effects are non-existent in these frequencies, C-band can provide region-wide coverage with good availability, regardless of rain zones. In order to maintain the required quality of service in an economically viable manner, operators must build smaller beams centered on areas of high demand and population density due to severe rain fading effects on Ku-band or Ka-band transmissions. Such factors are propelling the satellite communication terminal market growth.

The increased use of electronically guided phased antennas for platforms such as commercial vehicles, trains, and boats has resulted from increased demand for communication on-the-move (OTM) solutions). Even when platforms such as military vehicles, trains, or boats are in motion, these antennas can track and maintain satellite links. In this phased array for OTM, hybrid beam steering is used, both electrically for elevation and mechanically for azimuth. As the steering of an antenna terminal is so important in gaining a satellite link, ESPA is utilized to prevent mechanical motion. The demand for uninterrupted mobile broadband coverage in remote and far-flung regions, streaming information and entertainment, extensive use of small satellites for commercialization and data transferability, technological advancements in transport and logistics networks, and increasing demand for broadband connections and VSAT connectivity are all driving the market for satellite communication terminals for civil use. In July 2021, the Digital Communications Commission (DCC) agreed to the sector regulator's request that VSAT operators offer telcos satellite-based cellular backhaul connectivity to enable continuous mobile broadband coverage in remote and far-flung areas. All such factors are anticipated to catalyze the satellite communication terminal market growth during the forecast period.

The satellite communication terminal market is segmented based on classification, application, satellite type, and geography. Based on classification, the satellite communication terminal market is segmented into C band, X band, S band, Ku band, and Ka band. Based on application, the satellite communication terminal market is segmented into military use and civil use. Based on satellite type, the satellite communication terminal market is segmented into GEO, MEO, and LEO. Additionally, based on region, the satellite communication terminal market is segmented into North America, Europe, Asia Pacific, Middle East & Africa, and South America.

Airbus; AVL Technologies; Collins Aerospace; General Dynamics Mission Systems, Inc.; Honeywell International Inc.; L3Harris Technologies, Inc.; NEC Corporation; ST ENGINEERING; Thales Group; Viasat, Inc. are among the key players operating in the satellite communication terminal market that are profiled in this market study.

The overall satellite communication terminal market size has been derived using both primary and secondary sources. Exhaustive secondary research has been conducted using internal and external sources to obtain qualitative and quantitative information related to the satellite communication terminal market. The process also helps obtain an overview and forecast of the market with respect to all the market segments. Also, multiple primary interviews have been conducted with industry participants to validate the data and gain analytical insights. This process includes industry experts such as VPs, business development managers, market intelligence managers, and national sales managers, along with external consultants such as valuation experts, research analysts, and key opinion leaders, specializing in the satellite communication terminal market.

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