



The Satellite IoT Communications Market

1st Edition

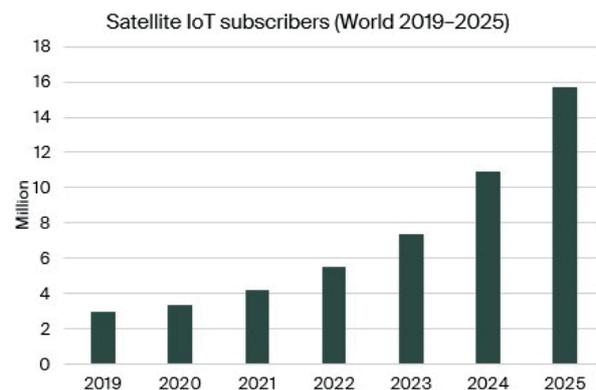
The Satellite IoT Communications Market analyses the latest trends and developments on the emerging satellite IoT connectivity market. This strategic research report from Berg Insight provides you with 55 pages of unique business intelligence including 5-year industry forecasts and expert commentary on which to base your business decisions.

The number of satellite IoT subscribers to reach 15.7 million in 2025

IoT communications is a growing segment of the international market for satellite data communications. Only about 10 percent of the Earth's surface has access to terrestrial connectivity services which leaves a massive opportunity for satellite IoT communications. Satellite connectivity provides a complement to terrestrial cellular and non-cellular networks in remote locations, especially useful for applications in agriculture, asset tracking, maritime and intermodal transportation, oil and gas industry exploration, utilities, construction and governments. This study covers 38 satellite IoT operators.

The global satellite IoT communications market is growing at a good steady pace. Despite the impact of the COVID-19 pandemic, the global IoT subscriber base grew to surpass 3.4 million in 2020. The installed base of satellite IoT connections will increase at a compound annual growth rate (CAGR) of 35.8 percent to reach 15.7 million units in 2025. Orbcomm, Inmarsat, Iridium and Globalstar are the largest satellite network operators in IoT. Originally a dedicated satellite operator, Orbcomm has transitioned into an end-to-end solution provider, delivering services on its own satellite network as well as being a reseller partner of Inmarsat and others. At the end of Q4-2020, the company had 1.2 million satellite IoT subscribers on its own and Inmarsat's networks. At the same time Iridium and Globalstar had 1.1 million and 0.4 million subscribers respectively. Inmarsat does not currently report IoT subscribers. Other players with connections in the tens of thousands include for instance Kineis in France

and Thuraya in the UAE. In addition to the incumbent satellite operators a number of new initiatives have appeared on the market recently. Examples of some high-profile projects are Astrocast, CASC/CASIC, Fleet Space Technologies, Hiber, Ingenu, Kepler Communications, Lynk, Myriota, Skylo, Swarm Technologies (SpaceX) and Totum Labs. Many of these are based on low-earth orbit nano satellite concepts. While most rely on proprietary satellite connectivity technologies to support IoT devices, several are starting to leverage terrestrial wireless IoT connectivity technologies. Examples include OQ Technology, AST SpaceMobile, Omnispace, Sateliot and Galaxy Space (3GPP 4G/5G); EchoStar Mobile and Lacuna Space (LoRaWAN); and Eutelsat (Sigfox).



Highlights from the report

360-degree overview of the satellite IoT communications ecosystem.

Reviews of the strategies of 38 satellite IoT operators.

Perspectives on the impact of the new LEO nanosatellite constellations.

Summary of the latest industry trends and developments.

Reviews of operator market shares and competitive dynamics.

Extensive global and regional market forecasts lasting until 2025.

Table of contents

Executive summary

1 Satellite networks for the Internet of Things

1.1 Introduction to satellite IoT technologies

- 1.1.1 Traditional GEO constellations
- 1.1.2 The new age of large LEO constellations

1.2 Satellite IoT constellations

- 1.2.1 Satellite orbit types
- 1.2.2 Space junk challenges
- 1.2.3 Frequency bands
- 1.2.4 Latency
- 1.2.5 Coverage and capacity

1.3 Investments and M&As in the satellite IoT industry

1.4 Use cases for satellite IoT

1.5 Business models and project strategies

2 Market forecasts and trends

2.1 Market analysis

- 2.1.1 The incumbent satellite IoT operators
- 2.1.2 The new space race boosted by numerous new LEO constellations
- 2.1.3 Satellite IoT subscriber forecasts
- 2.1.4 Satellite operator market shares

2.2 Regional trends

- 2.2.1 Europe
- 2.2.2 North America
- 2.2.3 China
- 2.2.4 Rest of World

2.3 Future industry trends

3 Company profiles and strategies

3.1 European satellite operators

- 3.1.1 Astrocast
- 3.1.2 EchoStar Mobile
- 3.1.3 Eutelsat
- 3.1.4 Hiber
- 3.1.5 Inmarsat
- 3.1.6 Kineis
- 3.1.7 Lacuna Space
- 3.1.8 OneWeb
- 3.1.9 OQ Technology
- 3.1.10 Sateliot

3.2 North American satellite operators

- 3.2.1 Amazon
- 3.2.2 AST SpaceMobile
- 3.2.3 eSAT Global
- 3.2.4 Globalstar
- 3.2.5 Ingenu
- 3.2.6 Iridium
- 3.2.7 Kepler Communications
- 3.2.8 Lynk
- 3.2.9 Omnispace
- 3.2.10 Orbcomm
- 3.2.11 Skylo
- 3.2.12 Starlink (SpaceX)
- 3.2.13 Swarm Technologies
- 3.2.14 Telesat
- 3.2.15 Totum Labs

3.3 Chinese satellite operators

- 3.3.1 CASC and CASIC
- 3.3.2 Commsat

3.3.3 Galaxy Space

3.3.4 Geely

3.3.5 Guodian Tech

3.3.6 Head Aerospace

3.3.7 Linksure

3.4 Rest of World satellite operators

3.4.1 Fleet Space Technologies

3.4.2 HiSky

3.4.3 Myriota

3.4.4 Roscosmos

3.4.5 Sky and Space Company

3.4.6 Thuraya

Glossary

This report answers the following questions

- Which IoT applications are most relevant for satellite connectivity?
- What are the latest developments in the satellite IoT communications market?
- How will the emerging LEO nanosatellite constellations affect the market?
- What are the market shares for the leading satellite IoT operators?
- What are the regional developments in North America, Europe, China and ROW?
- How is the competitive landscape of satellite IoT operators evolving?
- How will the global satellite IoT market evolve over the next five years?

About Berg Insight's IoT market research

Our market reports offer comprehensive information and analysis on key IoT technologies and markets, addressing important concerns including total addressable market, market penetration, market shares, industry landscape, regulatory environment, market trends and forecasts. Our research portfolio today comprises more than 55 items, where each market report focuses on a specific vertical application area or cover horizontal themes. All market reports come with complementary data sets in Excel format that can be easily analysed and converted into tables and charts. We offer a range of different license options together with bundled packages and subscriptions to suit your specific needs.



HORIZONTAL THEMES

The Satellite IoT Communications Market

PUBLISHED DATE October 2021
 AUTHORS Johan Fagerberg

PDF & EXCEL: 1 user license	€1 500
PDF & EXCEL: 2-10 user license	€2 250
PDF & EXCEL: Enterprise license	€3 000

Read more and place order on berginsight.com



Who should buy this report?

The Satellite IoT Communications Market is the foremost source of information about the emerging satellite IoT connectivity market. Whether you are a device vendor, service provider, satellite operator, investor, consultant, or government agency, you will gain valuable insights from our in-depth research.

AUTHOR

Johan Fagerberg

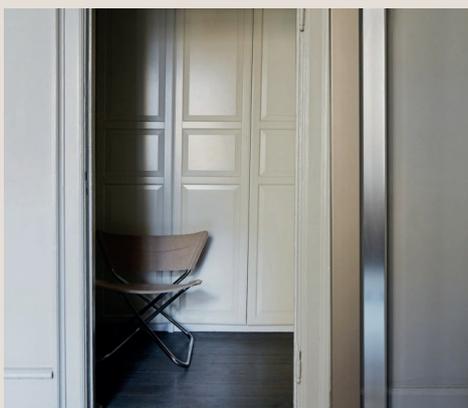


Johan is the CEO and co-founder of Berg Insight. He is a respected IoT industry expert, with 25 years' experience of strategy consulting, operations management and telecoms market research. His past research has covered automotive telematics, fleet management and industrial IoT topics. Johan is widely quoted in trade publications such as IoT Now Transport, Light Reading, Automotive World and IoT Business News. Johan holds a Master's degree in Electrical Engineering from Chalmers University of Technology in Sweden and a post graduate degree program in project management.

CONTACT

Berg Insight AB
 Viktoriagatan 3
 411 25 Gothenburg
 Sweden

+46 (0)31 711 30 91
 info@berginsight.com
 www.berginsight.com



Berg Insight offers premier business intelligence to the telecom industry. We produce concise reports providing key facts and strategic insights about pivotal developments in our focus areas. Berg Insight also offers detailed market forecast databases and advisory services. Our vision is to be the most valuable source of intelligence for our customers.