

2025

SATELLITE COMMUNICATION

SAMPLE REPORT

Get an in-depth analysis of the satellite communication market's current state, trends, and future, including insights into key drivers, changing product lifecycles, and manufacturing challenges.

JABIL | PROCUREMENT & SUPPLY CHAIN SERVICES

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1. Executive Summary

The satellite communication (satcom) market is at a critical juncture as the residual effects of the COVID-19 pandemic gradually diminish, creating new opportunities for stakeholders. System enhancements, increasing adoption, and technology evolution bring significant opportunities to those operating in the industry. With the increasing adoption of satellite applications across several industries, including communications, defense, automotive (navigation), and aviation, satcom equipment manufacturers must refine their strategies to remain competitive.

The smart home market in North America is characterized by its maturity, focusing on enhancing convenience, energy efficiency, and security. The region boasts significant strides in integrating AI and voice control, primarily through devices like Amazon's Echo and Google Home, which have become household staples. This advancement is propelled by consumers prioritizing compatibility between different devices and systems, aiming for a seamless smart home experience. Despite its advances, the market continues to face increased challenges related to privacy concerns and the complexity of device setup, which requires a certain level of IT expertise.

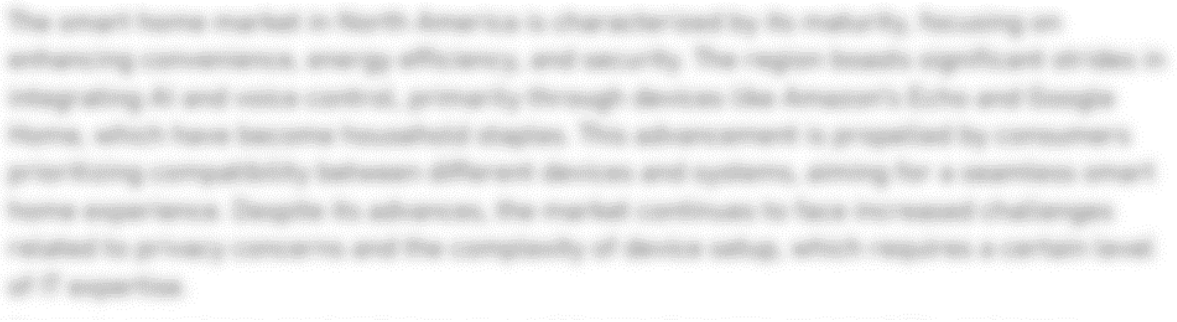
Europe's smart home market thrives on a solid commitment to sustainability and energy efficiency. Governmental incentives and a collective drive towards sustainable living practices significantly influence the region's focus. Smart meters and energy management systems are particularly popular, catering to the demand for devices that reduce energy consumption. Additionally, there's a growing trend towards enhanced home security systems. This increase is partly driven by regional conflicts and geopolitical tensions, which, along with shifting migration patterns, have led to a rise in domestic crime rates. Consequently, there's a heightened demand for advanced security products, including surveillance cameras and motion sensors, to ensure household safety. Moreover, the aging population in Europe represents another critical segment, with smart home solutions focusing on safety and accessibility to cater to their needs.

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2. Market Overview

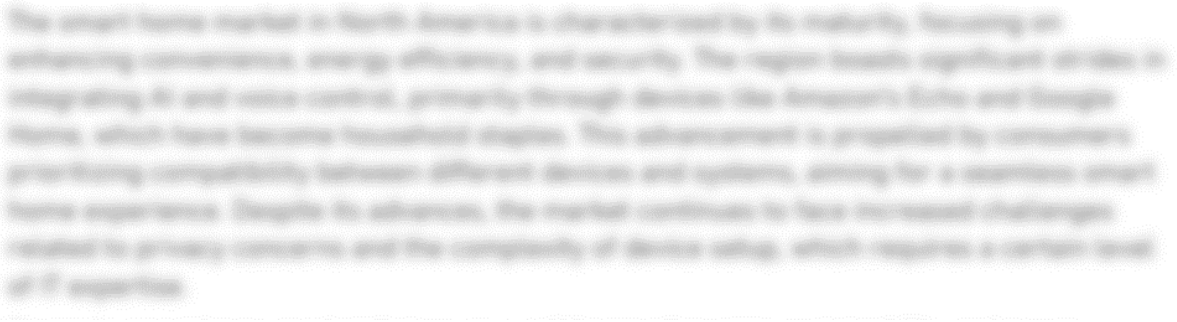
2.1 Market Definition: Satellite Communications

Satellite communication is a mode of telecommunication that uses artificial satellites orbiting the Earth to relay signals between different locations on the ground. Essentially, it acts as a giant, space-based repeater system. A ground station transmits a signal (carrying data, voice, or video) to the satellite, a process known as the "uplink." The satellite, equipped with transponders, receives the signal, amplifies it, and then re-transmits it back down to Earth on a different frequency called the "downlink." This allows communication over vast distances, even to remote or geographically challenging areas where terrestrial infrastructure is impractical or unavailable.



2.2 Market Overview

The satellite communication equipment market has grown exponentially over the past few years, driven by the increasing need for high-speed, uninterrupted, and reliable communications networks in remote areas. The commercial space industry has developed significantly in the last few years, mainly because of its increasing adoption in 5G terrestrial networks. The need for connectivity across critical platforms, such as Aircraft & Seafaring Vessels, has also boosted the market for satellite communications.



2.2.1 Market Growth Enablers

- **Lower Launch Costs:** The emergence of reusable rockets and smaller satellites helps reduce satellite launch costs, making satellite deployments more economically feasible.
- **Improved Ground Segment Technology:** Advancements in ground station terminals, modems, and network management systems are making satellite communication more efficient and user-friendly.
- **New Space Companies and Innovation:** The rise of private space companies has brought innovation and competition to the satellite communication market, leading to new business models and service offerings.
- **Government Initiatives:** Governments worldwide recognize the strategic importance of satellite communication for national security, disaster relief, and economic development, leading to increased investments and supportive policies.
- **Convergence with Terrestrial Networks:** Satellite communication is being integrated with terrestrial networks (5G, fiber) to create hybrid solutions that offer enhanced coverage, resilience, and performance.
- **In-Flight Connectivity (IFC):** The growing demand for broadband internet access on aircraft is a major driver of the satellite communication market.
- **Military and Defense Communications:** Secure and reliable communication is critical for military operations, and satellites provide connectivity in challenging environments.

2.2.2 Market Inhibitors

- **Lower Launch Costs**: The emergence of reusable rockets and smaller satellites helps reduce satellite launch costs, making satellite deployments more economically feasible.
- **Improved Ground Segment Technology**: Advancements in ground station terminals, modems, and network management systems are making satellite communication more efficient and user-friendly.
- **New Space Companies and Innovation**: The rise of private space companies has brought innovation and competition to the satellite communication market, leading to new business models and service offerings.
- **Government Initiatives**: Governments worldwide recognize the strategic importance of satellite communication for national security, disaster relief, and economic development, leading to increased investments and supportive policies.
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- **In-Flight Connectivity (IFC)**: The growing demand for broadband internet access on aircraft is a major driver of the satellite communication market.
- **Military and Defense Communications**: Secure and reliable communication is critical for military operations, and satellites provide connectivity in challenging environments.

3. Technology Overview

3.1 Satellite Communication Equipment Technologies

3.1.1 Software Defined Satellite

Software-defined satellite (SDS) technology represents a paradigm shift in satellite design and operation, bringing software-defined networking (SDN) flexibility and agility to space. Instead of relying on fixed, hardware-based functionalities, SDS enables satellites to be reprogrammed and reconfigured in orbit through software updates. This allows for greater adaptability, optimization, and longevity of satellite systems. According to a report published by Verified Market Research, the software-defined satellite market is expected to grow from $ 2.69Bn in 2023 to $ 8.12Bn in 2030 at a CAGR of 14.8%. The infographic below is derived from the same source.



3.1.2 Hybrid Satellite Networks

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3.1.3 IOT Connectivity

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3.1.4 High Throughput Satellites

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3.1.5 Satellite Data Services

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3.2 Emerging Technologies

3.2.1 AI & ML

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Global AI in Space Exploration Market
32.4%
$35B

3.2.2 5G Technology

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3.2.3 Satellite Constellations

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3.2.4 Mobility & Connectivity on the Move

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3.2.5 Direct-to-cellular Technology

Direct-to-cellular service, also known as direct-to-cell, is a technology that allows mobile phones to connect directly to satellites in space for network connectivity, bypassing the need

for traditional cell towers. This means cell service can even be accessed in remote areas where terrestrial cellular networks don't reach.

Examples:

Satellite Service Provider	Direct-to-cellular Offering
SpaceX (US)	
AST SpaceMobile (US)	
Globalstar (US) + Apple Inc. (US)	

Source: Company Website & Press Releases

4. Recent Developments

Date	SATCOM Equipment Supplier/ Manufacturer	End User (Company 2)	Development Type	Description	Deal Value
Dec 2024	Viasat (US)				
Dec 2024	Starlink (US)				
Dec 2024	Starlink (US)				
Dec 2024	Airbus Defence & Space (Germany)				
Dec 2024	Parsons Corporation (US)				
Nov 2025	Telesat (Canada)				
Oct 2024	Thales Alenia Space (France)				

Date	SATCOM Equipment Supplier/ Manufacturer	End User (Company 2)	Development Type	Description	Deal Value
Oct 2024	ST Engineering (Singapore)				
May 2024	SKY Perfect JSAT (Japan)				
Mar 2024	Singtel (Singapore)				

Source: Company Website & Press Releases

5. Supply Chain Overview

5.1 Demand Overview

The smart home market in North America is characterized by its maturity, focusing on enhancing convenience, energy efficiency, and security. The region boasts significant strides in integrating AI and voice control, primarily through devices like Amazon's Echo and Google Home, which have become household staples. This advancement is propelled by consumers prioritizing compatibility between different devices and systems, aiming for a seamless smart home experience. Despite its advances, the market continues to face increased challenges related to privacy concerns and the complexity of device setup, which requires a certain level of IT expertise.

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5.2 Supply Analysis

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6. Jabil Insights

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6.2 Lead Times



Create with Datawrapper

6.3 Jabil Spend Analysis



Note: The above spend data is for the broader market across the communication industry.

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