NSR

An Analysys Mason Company

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Satellite Capacity Supply & Demand

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IOR
- Total TPE & Bandwidth Demand
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POR
- Total TPE & Bandwidth Demand
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PREFACE

Dear Reader,

Thank you very much for the purchase of this report.

The Satcom industry grew in 2022, but this expansion was captured by Starlink and a few other GEO operators. Many of the GEO operators registered revenue declines. With the industry consolidation and arrival of LEOs, this trend will likely continue with a few actors absorbing most of the opportunities. In this context, it is crucial to seek the strategies capable of delivering growth.

Within traditional wholesale verticals, Video will inevitably decline, but it is still a huge cash generator that cannot be ignored. Broadband Access will be the fastest growing vertical, but its business model has multiple associated challenges. Growth in Mobility is impressive as trends like free Wi-Fi consolidate. Backhaul and Enterprise Data also show great potential.

In all cases, actors will need to adapt their business models. For example, MNOs now require end-to-end services or Enterprise customers value new services like SD-WAN and Cloud.

What is certain is that capacity is commoditizing. Operators need to embrace it and seek new sources of differentiation including adopting standards for integration with the Telco ecosystem, foster new ecosystems of partnerships within the industry and with Telcos, or cultivate new value-added services and growth markets.

As always, we remain available for any clarification needed on the data and elements discussed in this or any of the reports on NSR's library. We truly appreciate your trust and support with the purchase of this report.

Enjoy the reading,

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The Satcom industry has a massive opportunity ahead as verticals like Broadband, Mobility and Backhaul develop. In the future's multi-architecture networks, success will come from how well the different elements are orchestrated. The industry's goal should be seamless integration to facilitate adoption. Satcom will succeed by making Telcos successful. It should be Telcos' new differentiator and growth engine.

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Non-GEOs are advancing rapidly, and it is evident from Starlink's satellite launch pace & customer acquisition, OneWeb's constellation completion and O3b mPower's progression. These will result in various reshuffling of Satcom's ecosystem dynamics as incumbents strategize to build multi-orbit solutions or/and consolidate.

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