

ANMD-MRS31-310 · Space Sustainability & Applications

Satellite IoT Connectivity Services

A Global Sustainability Due Diligence & Market Research Study

History 2020–2024 · Base Year 2025 · Forecast 2025–2032 · Outlooks 2035 / 2040 / 2050 · Currency US\$

WHY THIS REPORT

Satellite IoT connectivity services connect remote sensors for agriculture, environment and asset efficiency where terrestrial networks cannot reach. LEO IoT constellations, store-and-forward and direct-to-device services link low-power terminals across oceans, farms and pipelines. This decision-grade study sizes the global market three ways — value, subscriptions and connected devices — across service type, sub-type, component and application, across seven regions and four scenarios to 2032, with outlooks to 2050.

SUSTAINABILITY & SDG IMPACT — THE ANMD LENS

Sustainability is this report's backbone, not an afterthought. Beyond connectivity performance, satellite IoT delivers measurable remote environmental sensing, agricultural efficiency and asset optimisation, while constellation sustainability shapes the natural-capital story.

Mapped Sustainable Development Goals:

SDG 2	SDG 9	SDG 11	SDG 13	SDG 15
Zero Hunger	Industry & Infrastructure	Sustainable Cities	Climate Action	Life on Land

Measurable sustainability outcomes assessed:

- Remote environmental sensing and agricultural efficiency
- Asset optimisation and supply-chain visibility at planetary scale
- Orbital debris, end-of-life deorbit and digital-divide equity as material risks
- Terminal and constellation embodied carbon and circularity

Framework alignment: Double materiality mapped to GRI, SASB, ISSB, TCFD, TNFD, CSRD and the EU Taxonomy, with greenwashing and SDG-washing screens applied throughout.

WHAT'S INSIDE AT A GLANCE

53 Chapters	9 Report Parts	7 Regions Covered	40+ Country Markets
2025–32 Forecast Horizon	4 Forward Scenarios	25+ Companies Profiled	5 SDGs Mapped

REPORT COVERAGE

Geographic scope: North America, Europe, Asia Pacific, Latin America, Africa, Middle East and Rest of World — with named country intelligence. North America leads operators; Europe scales on LEO IoT; Asia Pacific is the growth engine connecting agriculture and remote assets.

MARKET OVERVIEW

From niche messaging to ubiquitous coverage — where reaching the unreachable defines value.

The satellite IoT connectivity market is moving from niche messaging to ubiquitous low-power coverage. Demand is driven by remote-asset and supply-chain monitoring, agriculture and environmental sensing, and coverage beyond terrestrial networks, supported by LEO-constellation and direct-to-device advances. The market is read three ways — value, subscriptions and connected devices — and forecast under four scenarios, each region reported separately.

- North America leads operators, anchored by the United States, where Iridium, Globalstar and ORBCOMM lead satellite IoT
- Europe scales on LEO IoT, with Switzerland's Astrocast and European constellations expanding coverage
- Asia Pacific is the growth engine, as China, India and Australia connect agriculture and remote assets
- Service type and sub-type segment the value — across LEO IoT constellations, store-and-forward and direct-to-device

REGIONAL OUTLOOK

Across seven reporting regions, the report separates early commercialisation leaders from high-growth and emerging markets — each profiled in full rather than aggregated into Rest of World.

Region	Stage	Lead Markets & Drivers
North America	Commercial leader	United States, Canada — NewSpace, commercial constellations, defense demand
Europe	Institutional anchor	France, Germany, Switzerland, UK — ESA, LEO IoT, primes, sustainability rules
Asia Pacific	Growth engine	China, India, Japan, Australia — national programmes, NewSpace, manufacturing
Latin America	Emerging	Brazil, Argentina — IoT applications, NewSpace startups
Africa	Frontier	South Africa, Egypt, Nigeria — IoT for agriculture, climate, development
Middle East	High-growth	UAE, Saudi Arabia — space agencies, sovereign investment, diversification

KEY MARKET DRIVERS & RESTRAINTS

Drivers	Restraints
• Remote-asset & supply-chain monitoring • Agriculture & environmental-sensing demand • Coverage beyond terrestrial networks • Low-power, low-cost terminal economics • LEO-constellation & direct-to-device technology gains	• Latency & bandwidth limits • Spectrum & regulatory coordination • Terminal-cost & power constraints • Orbital-debris & deorbit obligations • Competition from terrestrial & NTN networks

SEGMENTATION SNAPSHOT

By Service Type	LEO IoT constellations · store-and-forward · direct-to-device
By Sub-Type	Real-time · near-real-time · messaging
By Application	Agriculture · logistics & asset tracking · energy & utilities · environment
By End User	Agriculture · logistics · energy & utilities · environmental monitoring
By Component	LEO payloads · IoT terminals · antennas · gateways · network software
By Business Model	Subscription · per-message · connectivity-as-a-service

TABLE OF CONTENTS — PARTS & CHAPTERS

The full report is organised into nine parts across 53 chapters, listed below. Detailed sub-headings, country tables and directories are provided in the full report.

Part I — Report Foundation, Discovery and Strategic Intelligence

- › Chapter 1. Scope, Methodology and Report Architecture
- › Chapter 2. Industry Discovery Summary — Satellite IoT Connectivity Services
- › Chapter 3. Executive Intelligence and Decision Dashboard
- › Chapter 4. Strategic Findings, Materiality and Investment Verdict Preview

Part II — Market Intelligence, Sizing, Forecasting and Segmentation

- › Chapter 5. Industry Overview and Market Evolution
- › Chapter 6. Market Dynamics
- › Chapter 7. Global Market Size and Forecast, 2020–2032
- › Chapter 8. Market Segmentation Analysis
- › Chapter 9. End-User and Demand-Side Intelligence
- › Chapter 10. Pricing, Cost and Commercial Model Intelligence

Part III — Regional and Country Intelligence

- › Chapter 11. Global Regional Intelligence Framework
- › Chapter 12. North America Market Intelligence
- › Chapter 13. Europe Market Intelligence
- › Chapter 14. Asia Pacific Market Intelligence
- › Chapter 15. Latin America Market Intelligence
- › Chapter 16. Africa Market Intelligence
- › Chapter 17. Middle East Market Intelligence
- › Chapter 18. Rest of World Market Intelligence

Part IV — Technology, Innovation and Category-Specific Intelligence

- › Chapter 19. Technology Landscape and Architecture
- › Chapter 20. Emerging and Next-Generation Technology Intelligence
- › Chapter 21. Category-Specific Intelligence Module
- › Chapter 22. Research, Innovation and Funding Landscape

Part V — Company, Competition, Patent and Project Intelligence

- › Chapter 23. Competitive Landscape
- › Chapter 24. Company Profiles
- › Chapter 25. Mergers, Acquisitions, Partnerships and Ecosystem Intelligence
- › Chapter 26. Patent Landscape and Intellectual Property Intelligence
- › Chapter 27. Project, Deployment and Case-Study Intelligence

Part VI — Sustainability, ESG, SDG, Climate and Natural-Capital Intelligence

- › Chapter 28. Sustainability Intelligence Suite
- › Chapter 29. ESG Intelligence and Double Materiality
- › Chapter 30. ESG and Sustainability Framework Alignment
- › Chapter 31. SDG Intelligence
- › Chapter 32. Carbon, Net-Zero and Climate-Mitigation Intelligence
- › Chapter 33. Water, Biodiversity and Natural-Capital Intelligence
- › Chapter 34. Circular Economy and Resource-Security Intelligence
- › Chapter 35. Social Impact, Human Capital and Community Intelligence
- › Chapter 36. Climate Risk, Adaptation and Resilience Intelligence

Part VII — Supply Chain, Policy, Legal, Economics and Finance

- › Chapter 37. Value Chain, Supply Chain and Geopolitical Intelligence
- › Chapter 38. Policy, Regulation and Incentive Intelligence
- › Chapter 39. Legal, Contracting and Risk-Allocation Intelligence
- › Chapter 40. Unit Economics, CAPEX, OPEX and Return Analysis
- › Chapter 41. Investment, Sustainable Finance and Bankability Intelligence

Part VIII — Scenario, Future Intelligence and Final Due Diligence Verdict

- › Chapter 42. Scenario Analysis and Future Intelligence
- › Chapter 43. Sustainability Due Diligence Framework and Data-Room Index
- › Chapter 44. Risk Register, RAG Rating and Anti-Greenwashing Screen
- › Chapter 45. Bottom-Line Verdict and Strategic Recommendations
- › Chapter 46. Implementation Roadmap and Stakeholder Playbooks

Part IX — Annexes, Directories and Reference Material

- › Chapter 47. Methodology Annex
- › Chapter 48. Corporate Directory and Company Intelligence Annex
- › Chapter 49. Patent Directory and Patent Intelligence Annex
- › Chapter 50. Project Intelligence Annex
- › Chapter 51. Forecast Annex
- › Chapter 52. Sustainability KPI Annex
- › Chapter 53. Reference Annexes

COMPETITIVE & INVESTMENT SNAPSHOT

The competitive field spans established space primes, NewSpace operators and specialist technology providers. Deal activity — constellation expansion, direct-to-device partnerships and terminal deals — signals a market consolidating around bankable, scalable services.

Representative players profiled in the full report:

Iridium Communications Inc. · Globalstar, Inc. · ORBCOMM Inc. · Astrocast SA · Space Exploration Technologies Corp. (SpaceX) · and 20+ further profiled players across constellations, terminals and network software.

Investment intelligence: venture, infrastructure, development, climate and blended finance, green bonds and sustainability-linked loans — culminating in a bankability assessment and a clear, evidence-based investment recommendation.

KEY QUESTIONS THIS REPORT ANSWERS

- ? How large is the global satellite IoT connectivity market, and how fast will it grow to 2032?
- ? Which regions, countries and segments offer the strongest risk-adjusted opportunity?
- ? How does low-power terminal economics change connectivity returns?
- ? Who leads, and where is the competitive and patent white space?
- ? Is the investment case bankable — and under what conditions?
- ? How does the technology align with the SDGs and emerging disclosure regulation?

WHY ANMD — THE DIFFERENCE

Most market studies stop at units and revenue. This report is built as a sustainability due diligence instrument — fusing market sizing with ESG, SDG, climate, water and natural-capital intelligence and a decision-ready bankability verdict in a single architecture.

- › Triangulated sizing — every market read three ways so value, volume and adoption views reconcile rather than conflict.
- › Region-honest forecasting — Latin America, Africa and the Middle East reported in full, never hidden inside Rest of World, every forecast resolved to the 2025 base year.
- › Integrated evidence base — company, patent and project databases linked to the analysis, with published-filing patents and FTO treated as an indicator, not a legal conclusion.
- › No-fabrication discipline — every estimate carries a data-confidence rating and disclosed sources; gaps are flagged for further diligence, never filled with invented numbers.
- › Anti-greenwashing rigour — SDG-washing and greenwashing screens plus claim-substantiation checks built into the ESG and project analysis.
- › Decision-first structure — 9 Parts and 53 Chapters culminating in stakeholder playbooks and a clear, evidence-based investment recommendation.

WHO SHOULD BUY THIS REPORT

Investors and infrastructure / PE funds, satellite operators, agriculture and agribusiness, logistics, energy and utilities, environmental monitoring, lenders, and corporate strategy and ESG teams, alongside strategic corporate planners and decision-makers.

Access the Full Report

The complete report delivers all 53 chapters in full, with every sub-heading, country table, company and patent directory, forecast model and due diligence checklist.

Purchase at www.anewmarketdynamics.com · Standard & Premium licences · Single-Site (SSL) and Global-Site (GSL) options at checkout.

Want the Complete Detailed Table of Contents?

This prospectus lists the nine parts and 53 chapters. The complete detailed table of contents — every sub-heading, country table, exhibit, company and patent directory and annex — is available on request to registered users. To receive it, register with your official company email at www.anewmarketdynamics.com. The full detailed table of contents will be sent directly to your registered company email address.