Overview

The “Future of Maritime Connectivity” is the third edition of Valour Consultancy’s comprehensive dive into the maritime connectivity market. Studied over a twelve month period of research and developed with the input of more than 30 companies from across the value chain, this study provides an unprecedented view of the markets for merchant, fishing, passenger, leisure and offshore.

Alongside a lengthy discussion of key drivers and inhibitors of market growth, this report quantifies the number of connected vessels, ARPU, revenues in 2018 and 2019 and provides a ten-year forecast out to 2029. Data is segmented by frequency band, application, geographic region, and hardware with a full qualitative discussion of the key trends at play in support of this. In-depth company profiles of major players are also included, along with their respective revenue market shares.

Key Questions Answered

What is the size of the maritime connectivity market in 2019?

How quickly will subscribers, revenues and ARPU grow over the next ten years and what factors will determine this?

How will the installation of new LEO and MEO satellite constellations affect the market over the next 10 years?

How will ARPU change over the next decade across the different frequency bands (L-band, C-band, Ka-band and Ku-band)?

How do the number of connected vessels and offshore platforms break down by key maritime segments (fishing, leisure, merchant, offshore, passenger)?

How does the market vary regionally? (Asia-Pacific; Europe; Middle East & Africa; Latin America; North America)

What are the top drivers for VSAT technology today and how will this change in the future?

What are the main drivers and inhibitors of growth in the industry?

How is maritime connectivity being used to improve internal operations as part of IoT and Smart Shipping?
Proposed Scope

The diagram below offers a visual summary of the quantitative analysis to be included in this report. 10 year forecasts will be provided for all segmentations from 2020 until 2029.

MARITIME CONNECTIVITY

Total Connected Vessels
Yearly Active Installations Revenues
($m)
ARPU ($)
Hardware revenues ($m)
ASP per unit

The report will quantify these metrics at a top level, then break them down by the segmentations below.

Market Segmentations

MARKET SHARES

Service Providers
Hardware Vendors
Satellite Operators

GEOGRAPHIC REGION

Asia-Pacific
EMEA
Central & South America
North America

APPLICATION

Fishing
Leisure
Merchant
Passenger
Offshore Energy

Frequency Band

L-Band Low-Speed No Voice
L-Band High-Speed Voice
C-Band
Ku-band
Ka-Band

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Source: Valour Consultancy

March 2020

Chart ES.3
Number of Installed Terminals at End of Year

Source: Valour Consultancy

March 2020

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### Report Details

- 124 pages of quantitative and qualitative analysis giving rich insight
- Engaging study of the maritime connectivity marketplace and potential outcomes
- Double base year (2018 and 2019) and forecasts to 2029, alongside robust justifications
- Full overview of the competitive environment and market trends
- Over 30 in-depth profiles of key companies involved in the marketplace
- Dedicated analyst time from the author to answer questions you have on the study
- PDF report and Excel tables, plus an invite to an exclusive summary webinar

### About Valour Consultancy

Valour Consultancy is a UK-based provider of market intelligence services. Founded in 2012, the company has grown rapidly and is renowned for its comprehensive and high-quality research and consultancy services. Having firmly established itself in the aviation space, where many companies rely on its expert insight and analysis, Valour Consultancy has successfully expanded into a number of other markets including, maritime, industrial, drones, police and enterprise body-worn cameras, consumer electronics and more.

### What we offer

- Syndicated research reports
- Custom research and consulting
- Whitepapers
- Survey design and analysis
- Databases and tracker products
- Market briefings
- Public speaking, panel discussions and webinars

### Why Choose Valour Consultancy?

- 40 years combined experience
- Transparent methodology
- Ability to influence report content
- Unrivalled detail and accuracy
- Constant access to our consultants

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The company continues to operate in accordance with the three core values it was founded on – Honesty, Trust and Time. Doing so has enabled Valour Consultancy to deliver detailed and meaningful insight and establish long-lasting relationships in the process. Have a look at our testimonials page to discover what our clients have to say about working with us.
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