

Satellite Flat Panel Antenna Market - A Global and Regional Analysis: Focus on Application, Steering Mechanism, Type, Frequency Band, and Country - Analysis and Forecast, 2023-2033

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Abstracts

Introduction to Global Satellite Flat Panel Antenna Market

A satellite flat panel antenna is a type of directional antenna that focuses its radio signals in a specific direction while providing a wider beam compared to traditional dish antennas. This broader beam enables the antenna to cover a larger area with its signals. It includes a variety of tasks such as receiving and transmitting signals, tracking satellites, facilitating communication, enabling data transfer, ensuring reliable connectivity, and supporting satellite-based services such as television broadcasting and internet access. The global satellite flat panel antenna market is driven by several factors, including the rising demand for high-speed (5G/6G) wireless connectivity, increasing demand for multi-orbit antennas, and advancements in proprietary manufacturing technologies. The application of the global satellite flat panel antenna market is in various fields such as aviation, defense and government, maritime, and telecom. Satellite flat panel antennas enable faster data transmission rates, enhanced network capacity, and reliable and high-speed connectivity in demanding operational scenarios, allowing military personnel to maintain effective communication even in remote and challenging locations.

Market Introduction

Antenna designs have undergone significant evolution and have found applications across diverse fields. Ongoing advancements have enhanced their performance and utility. To ensure efficient evaluation of these designs, effective testing methods are

vital. With the rise of Internet of Things (IoT) devices and the emergence of smart cities, flat panel antennas enable seamless connectivity and data exchange among devices, facilitating efficient infrastructure management and enhancing the quality of life.

Currently, the trend toward more compact, scalable lighter, and beamforming antenna demonstrates the industry's commitment to improving performance, efficiency, and flexibility. Electronically steered flat panel antennas play a crucial role in maximizing satellite bandwidth efficiency and addressing weight considerations, particularly for mobility applications. In the coming decade, these antennas are expected to dominate the maritime and land-mobile sectors due to their lightweight design and simplified installation procedures. Meanwhile, mechanically steered antennas currently maintain a competitive edge in the aeronautical industry, benefitting from their early market presence and meeting the stringent performance requirements specific to this sector.

The deployment of satellite mega-constellations and the potential to provide global broadband coverage in remote areas have a positive impact on the global satellite flat panel antenna market. Several organizations, research institutes, and government agencies are working to introduce newer technologies into the global satellite flat panel antenna market.

In recent years, satellite flat panel antenna has registered an exponential surge in demand from the defense and government industry, with high demands for secure communications, surveillance, reconnaissance, and intelligence gathering. Additionally, the global satellite flat panel antenna market is expected to experience significant growth in the coming years, driven by the emergence of satellite mega-constellations deployed by prominent companies such as OneWeb, SpaceX, and Amazon's Project Kuiper. They focus on deploying thousands of satellites into orbit, creating a network that enables global connectivity. For instance, in February 2023, OneWeb and Intelsat successfully completed inflight testing of a hybrid low Earth orbit (LEO) and geostationary (GEO) inflight connectivity solution. The tests were conducted on an Intelsat's Bombardier CRJ-700 regional jet fitted with the new electronically steered array (ESA) antenna, which has been built in collaboration with Stellar Blu and OneWeb. This is the first time LEO and GEO satellite connectivity has been seamlessly switched in flight.

Market Segmentation:

Segmentation 1: by Application

Automotive

Aviation

Defense and Government

Enterprise

Maritime

Telecom

Oil and Gas

Space

Defense and Government Application to Continue its Dominance as the Leading Application Segment

The global satellite flat panel antenna market is led by the defense and government industry, with a 25.19% share in 2023. Satellite flat panel antennas find application in military/defense sectors, catering to the needs of reliable connectivity over long distances without signal interruptions or losses. They can be deployed on vehicles, aircraft, and ships, providing real-time data transfer, voice communication, and other critical services for situational awareness, command and control, and coordination between forces.

Satellite flat panel antennas are revolutionizing the broadband connectivity landscape by enabling high-speed internet access of up to 400Mbps through low Earth orbit (LEO) and medium Earth orbit (MEO) satellites. The advancements in satellite technology, coupled with the beamforming capabilities of these antennas, are propelling the demand for flat panel antennae. It is expected that the sales of satellite flat panel antennas will continue the same trend in the coming years and contribute significantly to the growth of the global satellite flat panel antenna market during the forecast period. For instance, in September 2021, the Kymeta Corporation launched the u8 MIL hybrid terminal, a military communications solution incorporating Kymeta's software-defined, electronic beam-steering technology. The terminal is designed to be rugged and has a low-profile form factor, making it easy to mount on various military vehicles and vessels. In

addition, it enables reliable and high-speed connectivity in demanding operational scenarios, allowing military personnel to maintain effective communication even in remote and challenging locations.

Segmentation 2: by Steering Mechanism

Electronically Steered Antenna

Mechanically Steered Antenna

Hybrid

Electronically Steered Antenna to witness the highest growth between 2023 and 2033.

The global satellite flat panel antenna market is expected to be dominated by the electronically steered antenna segment in 2023, with a 40.0% share in terms of revenue. Ongoing advancements in technology, such as the integration of advanced semiconductor components, improved power efficiency, and enhanced beamforming, are the factors driving the adoption of electronically steered antennas across various industries.

These antennas are ideal for applications that require high precision and fast response times, such as military communications and weather forecasting. For instance, in March 2023, the Space Development Agency (SDA) of the Pentagon awarded a \$5 million contract to CesiumAstro, a manufacturer of advanced aerospace communications systems, to develop L band active electronically steered antennas (AESAs) that are compatible with the Link 16 tactical data network, a standardized communication system employed by the U.S., North Atlantic Treaty Organization (NATO), and Coalition forces to facilitate the transmission and exchange of real-time tactical information.

Segmentation 3: by Type

Flat Panel Antenna for Satellite Communication (Satcom)

Flat Panel Antenna for Terrestrial Communication

Flat Panel Antenna for Satellite Communication (Satcom) to Witness the Highest

Growth between 2023 and 2033

The global satellite flat panel antenna market is expected to be dominated by flat panel antenna for satellite communication (Satcom) in 2023, with a 53.46% share in terms of revenue. The growing demand for high-speed broadband connectivity and reliable communication services is driving the adoption of flat panel antennas in satellite communication.

In the satellite communications industry, most flat panel antennas are waveguide-based, employing either horn or slot array antennas with mechanical steering, printed circuit board (PCB) antennas, or active electronically steered arrays. For instance, C-COM Satellite Systems Inc, a global provider of mobile auto-deploying satellite antenna systems, is directing its efforts toward developing a novel modular and cost-effective Ka band antenna tailored for the next generation of mobile satellite communications. This antenna will be designed to operate within the Ka band frequency range and possess conformal properties.

Segmentation 4: by Frequency Band

L and S Band (1 GHz – 4 GHz)

C and X Band (4 GHz – 12 GHz)

Ku, K, and Ka Band (13 GHz – 40 GHz)

Ku, K, and Ka Band (13 GHz – 40 GHz) to Witness the Highest Growth between 2023 and 2033

The global satellite flat panel antenna market is expected to be dominated by Ku, K, and Ka bands (13 GHz – 40 GHz) in 2023, with a 50.40% share in revenue due to the rising demand for new and advanced high-throughput satellite services.

Advancements in satellite technology, such as the deployment of high-capacity satellites and advanced modulation techniques, have increased the capabilities and efficiency of the Ku, K, and Ka bands. For instance, in March 2022, Intellian Technologies unveiled the manufacturing plan of phased array flat panel antennas designed for Ku and Ka band low Earth orbit (LEO) and medium Earth orbit (MEO) satellite networks. Intellian has developed electronically steered antennas (ESA) to

deliver exceptional performance. These antennas leverage Intellian's extensive experience and expertise in advanced antenna design, manufacturing, and reliable connectivity with non-geostationary satellites orbit (NGSO). The ground-breaking design of these antennas incorporates Intellian's leading phased array chipset, structure, and software, seamlessly integrated into a modular system that enables efficient production and worldwide distribution of this innovative ESA technology.

Segmentation 5: by Region

North America - U.S. and Canada

Europe - U.K., Germany, France, Russia, and Rest-of-Europe

Asia-Pacific - Japan, India, China, South Korea, and Rest-of-Asia-Pacific

Rest-of-the-World - Middle East and Africa and South America

North America was the highest-growing market among all the regions, registering a CAGR of 14.77%. North America is anticipated to gain traction in terms of satellite flat panel antenna production owing to the presence of a large number of satellite flat panel antenna manufacturers such as ThinKom Solutions, Inc., Kymeta Corporation, NXTCOMM, and Starlink (Space X). Moreover, favorable government regulatory policies are also expected to support the growth of the satellite flat panel antenna market in Europe and Asia-Pacific during the forecast period.

In North America, the U.S. is anticipated to show the highest growth in the satellite flat panel antenna market among other countries, such as the U.S. and Canada. U.S. is anticipated to grow at a CAGR of 14.99%. The growth of the U.S. in the satellite flat panel antenna market is mainly due to factors such as the increasing use of satellite technology in defense and military applications and the ability of these antennas to deliver high-speed broadband and satellite internet services to remote areas, among others.

Recent Developments in the Satellite Flat Panel Antenna Market

In May 2023, Dallas Fort Worth International Airport (DFW) partnered with AT&T to improve connectivity and critical infrastructure through a comprehensive wireless platform (CWP). AT&T plans to invest \$10 million in modernizing and

expanding the network covering the airport, supporting airport operations, and enhancing the free public Wi-Fi in terminals. Additionally, AT&T would establish a private 5G network for internal use by the airport to address the increasing demand for Internet of Things (IoT) use cases and the digitization of airport operations.

In April 2023, ALL.SPACE Networks Limited partnered with Kratos Defense & Security Solutions, Inc. to develop advanced terminal solutions for software-defined satellite ground systems. It features a multi-beam antenna.

In April 2023, OneWeb was selected to conduct two trials for the U.K. government's 'Very Hard to Reach Premises' connectivity program. The trials aim to connect the most remote homes and businesses in the U.K. and take place in the Shetland Islands and on Lundy Island. OneWeb's LEO network would deliver high-speed, low-latency connectivity for the trials through its partners BT and Clarus.

In March 2023, under a contract with Sierra Nevada Corporation (SNC), ThinKom Solutions, Inc. delivered its ThinAir Ka2517 phased array Satcom antenna systems for installation on Sierra Nevada's new RAPCON-X aircraft.

In March 2023, OneWeb and mu Space signed a multi-year, multi-million-dollar agreement to provide OneWeb's low Earth orbit (LEO) connectivity solutions to mainland Southeast Asia, including Thailand, Laos, Cambodia, Vietnam, and Malaysia.

In February 2023, GILAT SATELLITE NETWORKS received a multimillion-dollar contract from a leading integrator in the Asia-Pacific region for ER7000 Satcom on-the-move antenna to enable satellite-based internet for passenger trains.

Demand – Drivers and Limitations

Following are the drivers for the satellite flat panel antenna market:

Growing Demand for Satellite-Based Communication Services

Advancement in Proprietary Technologies

Rising Demand for High-Speed (5G/6G) Wireless Connectivity

Increasing Use of Multi-Orbit Antenna

Following are the challenges for the satellite flat panel antenna market:

Complex Design and Manufacturing

Need for Excessive Power Requirements

Proliferation of Interference

Following are the opportunities for the satellite flat panel antenna market:

Demand for High Data Rate Transmission

Company Consolidation

Use of Commercial Off-The-Shelf (COTS) Components

How can this report add value to an organization?

Product/Innovation Strategy: The product segment helps the reader understand the different types of antennas available for deployment and their potential globally. Moreover, the study provides the reader with a detailed understanding of the global satellite flat panel antenna market by steering mechanism (electronically steered antenna, mechanically steered antenna, and hybrid), type (flat panel antenna for satellite communication (Satcom), and flat panel antenna for terrestrial communication), and frequency band (L and S band, C and X band and Ku, K, and Ka band).

Growth/Marketing Strategy: The global satellite flat panel antenna market has seen major development by key players operating in the market, such as business expansion, partnership, collaboration, and joint venture. The favored strategy for the companies has been contracted to strengthen their position in the global satellite flat panel antenna market. For instance, in December 2022, OneWeb signed a contract with Hughes Network Systems for 10,000 Hughes LEO Terminals. The Hughes LEO

terminals have the company's electronically steered antenna and compact indoor/outdoor equipment. These terminals are designed to enable high-speed and low-latency broadband service on the OneWeb constellation.

Competitive Strategy: Key players in the global satellite flat panel antenna market analyzed and profiled in the study involve major satellite flat panel antenna manufacturing companies, satellite operators, and telecom operators. Moreover, a detailed competitive benchmarking of the players operating in the global satellite flat panel antenna market has been done to help the reader understand how players stack against each other, presenting a clear market landscape. Additionally, comprehensive competitive strategies such as partnerships, agreements, and collaborations will aid the reader in understanding the untapped revenue pockets in the market.

Methodology: The research methodology design adopted for this specific study includes a mix of data collected from primary and secondary data sources. Both primary resources (key players, market leaders, and in-house experts) and secondary research (a host of paid and unpaid databases), along with analytical tools, are employed to build the predictive and forecast models.

Data and validation have been taken into consideration from both primary sources as well as secondary sources.

Key Market Players and Competition Synopsis

The companies that are profiled have been selected based on thorough secondary research, which includes analyzing company coverage, product portfolio, market penetration, and insights, which are gathered from primary experts.

The top solution segment, which is leading, includes satellite flat panel antenna manufacturers that capture around 65% of the presence in the market. Players in other industries, such as satellite operators and telecom operators, account for approximately 20% and 15% of the presence in the market, respectively.

Key Companies Profiled:

Solution Providers

ALCAN Systems GmbH i.L.

ALL.SPACE Networks Limited

Ball Aerospace

C-COM Satellite Systems Inc

China Starwin Science & Technology Co., Ltd

GILAT SATELLITE NETWORKS

Hanwha Phasor

Kymeta Corporation

L3Harris Technologies

THE MTI CORPORATION

NXTCOMM

OneWeb

ST Engineering

Starlink

ThinKom Solutions, Inc.

Satellite Operators

OQ Technology

Intelsat

Avanti Communications Group PLC

Eutelsat S.A.

Omnispace, LLC

OneWeb

China Satellite Communications Co., Ltd.

Telecom Operators

Nokia

ZTE

China Telecom

AT&T

T-Mobile

Orange

Jio

Huawei

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