

Global SATCOM on the Move Market Size Study & Forecast, by Platform, Vertical, Frequency, and Regional Forecasts 2025-2035

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Abstracts

The Global SATCOM on the Move Market is valued at approximately USD 30.05 billion in 2024 and is projected to expand at an extraordinary CAGR of 19.30% during the forecast period of 2025-2035. SATCOM on the Move (SOTM) systems are redefining the global communication architecture by offering resilient, high-speed connectivity for mobile platforms such as land vehicles, airborne fleets, and maritime vessels. Leveraging satellite constellations across various frequency bands, these systems enable seamless real-time communication in the most demanding and remote operational environments. As the global demand for uninterrupted connectivity in military missions, emergency response, autonomous systems, and commercial transport escalates, SATCOM on the Move has emerged as a mission-critical enabler, seamlessly integrating edge computing, real-time data transmission, and multi-orbit satellite capabilities.

Driven by geopolitical turbulence and the growing need for battlefield situational awareness, defense agencies worldwide are actively integrating SATCOM on the Move technologies into command and control structures. Simultaneously, the commercial sector is witnessing unprecedented adoption as fleet operators, airlines, and maritime logistics companies pivot toward smart mobility solutions, in-flight broadband, and real-time cargo monitoring. The deployment of high-throughput satellites (HTS), low-earth orbit (LEO) constellations, and the evolution of software-defined payloads are radically transforming performance benchmarks. However, cost constraints related to equipment miniaturization, antenna integration, and interoperability across diverse satellite networks remain significant barriers to scale.

Regionally, North America currently commands a dominant share of the SATCOM on

the Move market due to extensive defense spending, strategic investments in satellite constellations, and strong public-private collaborations in communication technology. The U.S. military's advanced modernization programs, combined with NASA's expanding deep-space ambitions and SpaceX's Starlink deployment, are reinforcing this regional leadership. Europe follows closely, propelled by multinational space initiatives and homeland security mandates. Meanwhile, Asia Pacific is experiencing rapid acceleration, especially across China, India, South Korea, and Japan, where high-volume troop movement, naval expansions, and smart city projects are stimulating demand for agile and reliable SATCOM networks.

Major market player included in this report are:

Viasat Inc.

L3Harris Technologies, Inc.

Thales Group

Cobham Limited

Honeywell International Inc.

Raytheon Technologies Corporation

Gilat Satellite Networks

Northrop Grumman Corporation

BAE Systems

General Dynamics Corporation

Hughes Network Systems, LLC

Indra Sistemas, S.A.

Airbus S.A.S.

Boeing Defense, Space & Security

Iridium Communications Inc.

Global SATCOM on the Move Market Report Scope:

Historical Data – 2023, 2024

Base Year for Estimation – 2024

Forecast period – 2025-2035

Report Coverage – Revenue forecast, Company Ranking, Competitive Landscape, Growth factors, and Trends

Regional Scope – North America; Europe; Asia Pacific; Latin America; Middle East & Africa

Customization Scope – Free report customization (equivalent up to 8 analysts' working hours) with purchase. Addition or alteration to country, regional & segment scope*

The objective of the study is to define market sizes of different segments & countries in recent years and to forecast the values for the coming years. The report is designed to incorporate both qualitative and quantitative aspects of the industry within the countries involved in the study. The report also provides detailed information about crucial aspects, such as driving factors and challenges, which will define the future growth of the market. Additionally, it incorporates potential opportunities in micro-markets for stakeholders to invest, along with a detailed analysis of the competitive landscape and product offerings of key players. The detailed segments and sub-segments of the market are explained below:

By Platform:

Land

Airborne

Maritime

By Vertical:

Government & Defense

Commercial

By Frequency:

C Band

L & S Band

X Band

Ka Band

Ku Band

VHF/UHF Band

EHF/SHF Band

Multi Band

Q Band

By Region:

North America

U.S.

Canada

Europe

UK

Germany

France

Spain

Italy

Rest of Europe

Asia Pacific

China

India

Japan

Australia

South Korea

Rest of Asia Pacific

Latin America

Brazil

Mexico

Middle East & Africa

UAE

Saudi Arabia

South Africa

Rest of Middle East & Africa

Key Takeaways:

Market Estimates & Forecast for 10 years from 2025 to 2035.

Annualized revenues and regional level analysis for each market segment.

Detailed analysis of geographical landscape with Country level analysis of major regions.

Competitive landscape with information on major players in the market.

Analysis of key business strategies and recommendations on future market approach.

Analysis of competitive structure of the market.

Demand side and supply side analysis of the market.

Contents

CHAPTER 1. GLOBAL SATCOM ON THE MOVE MARKET REPORT SCOPE & METHODOLOGY

- 1.1. Research Objective
- 1.2. Research Methodology
 - 1.2.1. Forecast Model
 - 1.2.2. Desk Research
 - 1.2.3. Top-Down and Bottom-Up Approach
- 1.3. Research Attributes
- 1.4. Scope of the Study
 - 1.4.1. Market Definition
 - 1.4.2. Market Segmentation
- 1.5. Research Assumption
 - 1.5.1. Inclusion & Exclusion
 - 1.5.2. Limitations
 - 1.5.3. Years Considered for the Study

CHAPTER 2. EXECUTIVE SUMMARY

- 2.1. CEO/CXO Standpoint
- 2.2. Strategic Insights
- 2.3. ESG Analysis
- 2.4. Key Findings

CHAPTER 3. GLOBAL SATCOM ON THE MOVE MARKET FORCES ANALYSIS

- 3.1. Market Forces Shaping the Global SATCOM on the Move Market (2024–2035)
- 3.2. Drivers
 - 3.2.1. Defense Modernization and Network-Centric Warfare
 - 3.2.2. Surge in Commercial Mobility and In-Flight Connectivity
- 3.3. Restraints
 - 3.3.1. High Equipment Miniaturization and Integration Costs
 - 3.3.2. Regulatory and Spectrum-Allocation Challenges
- 3.4. Opportunities
 - 3.4.1. Proliferation of LEO and HTS Constellations
 - 3.4.2. Convergence with 5G and Edge-Compute Architectures

CHAPTER 4. GLOBAL SATCOM ON THE MOVE INDUSTRY ANALYSIS

- 4.1. Porter's 5 Forces Model
 - 4.1.1. Bargaining Power of Buyers
 - 4.1.2. Bargaining Power of Suppliers
 - 4.1.3. Threat of New Entrants
 - 4.1.4. Threat of Substitutes
 - 4.1.5. Competitive Rivalry
- 4.2. Porter's 5-Forces Forecast Model (2024–2035)
- 4.3. PESTEL Analysis
 - 4.3.1. Political
 - 4.3.2. Economical
 - 4.3.3. Social
 - 4.3.4. Technological
 - 4.3.5. Environmental
 - 4.3.6. Legal
- 4.4. Top Investment Opportunities
- 4.5. Top Winning Strategies (2025)
- 4.6. Market Share Analysis (2024–2025)
- 4.7. Global Pricing Analysis and Trends 2025
- 4.8. Analyst Recommendation & Conclusion

CHAPTER 5. GLOBAL SATCOM ON THE MOVE MARKET SIZE & FORECASTS BY PLATFORM, 2025–2035

- 5.1. Market Overview
- 5.2. Land
 - 5.2.1. Top Country Breakdown Estimates & Forecasts, 2024–2035
 - 5.2.2. Market-size Analysis by Region, 2025–2035
- 5.3. Airborne
 - 5.3.1. Top Country Breakdown Estimates & Forecasts, 2024–2035
 - 5.3.2. Market-size Analysis by Region, 2025–2035
- 5.4. Maritime
 - 5.4.1. Top Country Breakdown Estimates & Forecasts, 2024–2035
 - 5.4.2. Market-size Analysis by Region, 2025–2035

CHAPTER 6. GLOBAL SATCOM ON THE MOVE MARKET SIZE & FORECASTS BY VERTICAL, 2025–2035

- 6.1. Market Overview
- 6.2. Government & Defense
 - 6.2.1. Top Country Breakdown Estimates & Forecasts, 2024–2035
 - 6.2.2. Market-size Analysis by Region, 2025–2035
- 6.3. Commercial
 - 6.3.1. Top Country Breakdown Estimates & Forecasts, 2024–2035
 - 6.3.2. Market-size Analysis by Region, 2025–2035

CHAPTER 7. GLOBAL SATCOM ON THE MOVE MARKET SIZE & FORECASTS BY FREQUENCY, 2025–2035

- 7.1. Market Overview
- 7.2. C Band; L & S Band; X Band; Ka Band; Ku Band; VHF/UHF Band; EHF/SHF Band; Multi Band; Q Band
 - 7.2.1. Top Country Breakdown Estimates & Forecasts, 2024–2035
 - 7.2.2. Market-size Analysis by Region, 2025–2035

CHAPTER 8. GLOBAL SATCOM ON THE MOVE MARKET SIZE & FORECASTS BY REGION, 2025–2035

- 8.1. Regional Market Snapshot
- 8.2. North America SATCOM on the Move Market
 - 8.2.1. U.S. SATCOM on the Move Market
 - 8.2.1.1. Platform Breakdown & Forecasts, 2025–2035
 - 8.2.1.2. Vertical Breakdown & Forecasts, 2025–2035
 - 8.2.2. Canada SATCOM on the Move Market
 - 8.2.2.1. Platform Breakdown & Forecasts, 2025–2035
 - 8.2.2.2. Vertical Breakdown & Forecasts, 2025–2035
- 8.3. Europe SATCOM on the Move Market
 - 8.3.1. UK SATCOM on the Move Market
 - 8.3.1.1. Platform Breakdown & Forecasts, 2025–2035
 - 8.3.1.2. Vertical Breakdown & Forecasts, 2025–2035
 - 8.3.2. Germany ...
 - 8.3.3. France ...
 - 8.3.4. Spain ...
 - 8.3.5. Italy ...
 - 8.3.6. Rest of Europe ...
- 8.4. Asia Pacific SATCOM on the Move Market
 - 8.4.1. China ...

- 8.4.2. India ...
- 8.4.3. Japan ...
- 8.4.4. Australia ...
- 8.4.5. South Korea ...
- 8.4.6. Rest of Asia Pacific ...
- 8.5. Latin America SATCOM on the Move Market
 - 8.5.1. Brazil ...
 - 8.5.2. Mexico ...
- 8.6. Middle East & Africa SATCOM on the Move Market
 - 8.6.1. UAE ...
 - 8.6.2. Saudi Arabia ...
 - 8.6.3. South Africa ...
 - 8.6.4. Rest of Middle East & Africa ...

CHAPTER 9. COMPETITIVE INTELLIGENCE

- 9.1. Top Market Strategies
- 9.2. Viasat Inc.
 - 9.2.1. Company Overview
 - 9.2.2. Key Executives
 - 9.2.3. Company Snapshot
 - 9.2.4. Financial Performance (Subject to Data Availability)
 - 9.2.5. Product/Services Portfolio
 - 9.2.6. Recent Development
 - 9.2.7. Market Strategies
 - 9.2.8. SWOT Analysis
- 9.3. L3Harris Technologies, Inc.
- 9.4. Thales Group
- 9.5. Cobham Limited
- 9.6. Honeywell International Inc.
- 9.7. Raytheon Technologies Corporation
- 9.8. Gilat Satellite Networks
- 9.9. Northrop Grumman Corporation
- 9.10. BAE Systems
- 9.11. General Dynamics Corporation
- 9.12. Hughes Network Systems, LLC
- 9.13. Indra Sistemas, S.A.
- 9.14. Airbus S.A.S.
- 9.15. Boeing Defense, Space & Security

9.16. Iridium Communications Inc.

List Of Tables

LIST OF TABLES

Table 1. Global SATCOM on the Move Market, Report Scope

Table 2. Global SATCOM on the Move Market Estimates & Forecasts By Region
2024–2035

Table 3. Global SATCOM on the Move Market Estimates & Forecasts By Platform
2024–2035

Table 4. Global SATCOM on the Move Market Estimates & Forecasts By Vertical
2024–2035

Table 5. Global SATCOM on the Move Market Estimates & Forecasts By Frequency
2024–2035

Table 6. U.S. SATCOM on the Move Market Estimates & Forecasts, 2024–2035

Table 7. Canada SATCOM on the Move Market Estimates & Forecasts, 2024–2035

Table 8. UK SATCOM on the Move Market Estimates & Forecasts, 2024–2035

Table 9. Germany SATCOM on the Move Market Estimates & Forecasts, 2024–2035

Table 10. France SATCOM on the Move Market Estimates & Forecasts, 2024–2035

Table 11. Spain SATCOM on the Move Market Estimates & Forecasts, 2024–2035

Table 12. Italy SATCOM on the Move Market Estimates & Forecasts, 2024–2035

Table 13. Rest of Europe SATCOM on the Move Market Estimates & Forecasts,
2024–2035

Table 14. China SATCOM on the Move Market Estimates & Forecasts, 2024–2035

Table 15. India SATCOM on the Move Market Estimates & Forecasts, 2024–2035

Table 16. Japan SATCOM on the Move Market Estimates & Forecasts, 2024–2035

Table 17. Australia SATCOM on the Move Market Estimates & Forecasts, 2024–2035

Table 18. South Korea SATCOM on the Move Market Estimates & Forecasts,
2024–2035

Table 19. Brazil SATCOM on the Move Market Estimates & Forecasts, 2024–2035

Table 20. Mexico SATCOM on the Move Market Estimates & Forecasts, 2024–2035

List Of Figures

LIST OF FIGURES

- Fig 1. Global SATCOM on the Move Market, Research Methodology
- Fig 2. Global SATCOM on the Move Market, Forecast Model Framework
- Fig 3. Global SATCOM on the Move Market, Key Trends 2025
- Fig 4. Global SATCOM on the Move Market, Growth Prospects 2024–2035
- Fig 5. Global SATCOM on the Move Market, Porter’s Five Forces Model
- Fig 6. Global SATCOM on the Move Market, PESTEL Analysis
- Fig 7. Global SATCOM on the Move Market, Value Chain Analysis
- Fig 8. SATCOM on the Move Market By Platform, 2025 & 2035
- Fig 9. SATCOM on the Move Market By Vertical, 2025 & 2035
- Fig 10. SATCOM on the Move Market By Frequency, 2025 & 2035
- Fig 11. North America SATCOM on the Move Market, 2025 & 2035
- Fig 12. Europe SATCOM on the Move Market, 2025 & 2035
- Fig 13. Asia Pacific SATCOM on the Move Market, 2025 & 2035
- Fig 14. Latin America SATCOM on the Move Market, 2025 & 2035
- Fig 15. Middle East & Africa SATCOM on the Move Market, 2025 & 2035
- Fig 16. Global SATCOM on the Move Market, Company Market Share Analysis (2025)

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