

Global Flat-Panel Antennas for Manpack Satellite Communication Terminals Market Growth 2026-2032

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Abstracts

The global Flat-Panel Antennas for Manpack Satellite Communication Terminals market size is predicted to grow from US\$ 151 million in 2025 to US\$ 345 million in 2032; it is expected to grow at a CAGR of 11.7% from 2026 to 2032.

Flat-Panel Antennas for Manpack Satellite Communication Terminals are low-profile satellite communication antennas and highly integrated antenna subsystems designed for single-person carriage, backpack transport and rapid field deployment. The products establish two-way broadband satellite links for tactical, emergency, public-safety and remote field operations, primarily across X, Ku and Ka bands. Commercial configurations include electronically pointed flat-panel antennas based on phased-array or AESA architectures, motorized mechanically pointed flat-panel antennas and manually pointed lightweight flat-panel antennas. Depending on design, the antenna subsystem may integrate the radiating aperture, beam-pointing or servo-control functions, antenna control electronics, BUC, LNB and other inseparable RF front-end components. Current products support GEO, LEO and, increasingly, multi-orbit connectivity, with key design priorities centered on lower size, weight and power consumption, rapid satellite acquisition, ruggedization, environmental resistance and higher data throughput. The research focuses on professional-grade manpack flat-panel antenna products used in dismounted tactical communications, disaster-response command, public-safety field operations, critical-infrastructure field communications and live news gathering.

Key Findings

Global shipments are estimated at approximately 4,600 units in 2025 and around 5,500 units in 2026

The weighted average selling price is estimated at approximately US\$33,000 per unit in 2026

Ku-band products remain the principal commercial configuration, while electronically pointed AESA products are gaining importance

Dismounted tactical and defence communications remain the largest concentration of professional-grade demand

The confirmed core competitive universe comprises 22 manufacturers or product-responsible suppliers across major global production regions

Market Trends

Flat-Panel Antennas for Manpack Satellite Communication Terminals are moving from traditional GEO-oriented portable systems toward lighter, more integrated electronically pointed terminals capable of supporting LEO and multi-orbit connectivity. The transition is being driven by improvements in phased-array architecture, RF integration, beam-control electronics and power efficiency, allowing new terminals to reduce setup time and moving parts while providing higher throughput and more automated acquisition. Intellian's OW7MP, introduced for Eutelsat's OneWeb network in 2026, illustrates this transition with an AESA architecture, a weight of about 9 kg and a form factor designed for military rucksacks. At the same time, established technologies remain commercially relevant: Thinkom continues to offer man-portable flat-panel products across X, Ku and Ka bands using its CTS architecture, indicating that the market will remain technologically diversified rather than converging immediately on a single antenna architecture. Product development is therefore increasingly centered on SWaP optimization, one-touch or simplified acquisition, ruggedization, battery-powered operation and interoperability with multiple satellite networks.

Market Dynamics

Drivers

Demand growth is primarily supported by the modernization of tactical communications, greater requirements for resilient connectivity outside terrestrial networks and continued investment in emergency and government communications. Defence users increasingly require terminals that can be carried by small teams, deployed within minutes and

connected without large reflector structures. Europe represents an important demand catalyst: European Defence Agency data show that EU defence expenditure reached €418 billion in 2025 and equipment procurement reached €115 billion, supporting broader investment in communications, command-and-control and deployable equipment. The introduction of military-grade LEO manpack terminals is also expanding the addressable use case beyond traditional GEO communications toward lower-latency services for front-line and remote operations.

Restraints

The market remains constrained by relatively high unit costs, limited production scale, power consumption and thermal-management requirements, particularly for active electronically scanned arrays. Professional terminals require ruggedized enclosures, RF front ends, precise beam-pointing electronics, environmental qualification and secure network integration, resulting in substantially higher costs than consumer satellite terminals. Government and defence procurement cycles are also long and qualification-intensive, while conventional reflector-based manpack terminals remain competitive in applications where acquisition time, profile and mobility are less critical. In addition, frequency certification, satellite-network approval and interoperability requirements can increase development time and restrict rapid entry by smaller manufacturers.

Opportunities

The strongest opportunities are emerging from LEO and multi-orbit manpack terminals, electronically pointed antennas and replacement of conventional deployable reflector systems in missions where mobility and deployment speed carry high operational value. New applications are also developing in disaster response, border and remote-area public safety, power and energy infrastructure, and highly mobile field teams requiring broadband connectivity independent of local terrestrial networks. Greater integration of RF components and beam-control electronics can lower size and assembly complexity, creating an opportunity for specialized antenna manufacturers, phased-array technology providers and vertically integrated terminal suppliers. Expansion of sovereign defence communications programs and regional satellite constellations may further create localized demand for domestically manufactured or security-qualified antenna systems.

Challenges

Long-term industry challenges include balancing antenna performance, power consumption, thermal characteristics, weight and cost within a compact manpack form factor. Electronically pointed terminals must maintain link stability over wide scan angles

while meeting battery-life and ruggedization requirements, and vendors serving LEO networks must handle rapid satellite handovers and more complex tracking algorithms. The market also lacks a single standardized architecture, with AESA, CTS, waveguide-array and mechanically pointed flat-panel technologies continuing to coexist. This creates technical differentiation but increases qualification and integration complexity. Manufacturers must additionally manage export controls, defence procurement restrictions, RF semiconductor availability and customer requirements for secure supply chains.

Industry Chain Analysis

The upstream industry chain consists primarily of RF and microwave semiconductors, beamforming ICs, power amplifiers, low-noise amplifiers, frequency-conversion components, PCB and antenna substrates, waveguide structures, radomes, servo components, power electronics and ruggedized structural materials. Electronically pointed products are more dependent on RF semiconductor integration and beam-control electronics, while mechanically pointed flat-panel products place greater emphasis on low-loss aperture structures, motors, encoders and precision control assemblies. Component performance directly affects gain, EIRP, G/T, scan range, power consumption, heat dissipation and overall terminal weight.

The midstream segment covers antenna-array design, RF front-end integration, beam or pointing control, BUC and LNB integration, environmental hardening, system testing and satellite-network qualification. This stage captures a large portion of product value because antenna performance and terminal SWaP are determined primarily by system-level engineering rather than commodity mechanical assembly. Downstream customers include defence and special-operations units, emergency-response agencies, public-safety organizations, energy and infrastructure operators and mobile media teams. Value creation is increasingly shifting toward integrated antenna subsystems that combine the aperture, RF electronics and automatic pointing functions into a smaller number of field-replaceable assemblies.

Segment Insights

By Product Type, electronically pointed flat-panel antennas are the principal technology-upgrade direction, supported by AESA and other electronically steered architectures that eliminate or reduce mechanical pointing and enable faster acquisition of LEO satellites. Motorized mechanically pointed flat-panel antennas continue to maintain a meaningful installed and commercial base because they can offer favorable RF

efficiency and lower electronics complexity, while manually pointed products remain relevant in applications prioritizing low weight, low power consumption and simplified hardware. The three product categories therefore serve different combinations of cost, mobility, acquisition speed and power requirements rather than representing a simple linear replacement cycle.

By Frequency Band, Ku-band products represent the broadest established commercial segment because of mature satellite capacity, existing government and commercial networks and widespread availability of terminal RF components. Ka-band is gaining importance in high-throughput and new electronically pointed terminals, particularly as LEO and next-generation satellite networks expand. X-band remains strategically important in dedicated government and defence communications. By Supported Orbit, GEO-only products retain a substantial legacy base, while LEO-only and multi-orbit products are becoming increasingly important in new product development as customers seek lower latency, network resilience and broader constellation choice.

Downstream Market Opportunities

Dismounted tactical command communications represent the most important professional application, as military users increasingly require secure broadband connectivity for small units operating beyond terrestrial network coverage. Disaster rescue and public-safety applications form another attractive demand pool because satellite terminals can restore command, video and data links after terrestrial infrastructure is disrupted. Critical-infrastructure field communications are also expanding in power, oil, utilities and telecommunications maintenance, where personnel often operate in remote areas with limited cellular coverage. Field news gathering remains a smaller but established application in which low-profile manpack terminals support rapid transmission of live video and high-volume media files from temporary or infrastructure-limited locations.

Regional Insights

North America is one of the most mature demand and technology markets for professional manpack SATCOM, supported by defence procurement, tactical-network modernization and an established base of specialized antenna manufacturers. Europe is becoming increasingly important as higher defence investment supports deployable communications, secure connectivity and battlefield-network modernization. European manufacturers are also active across flat-panel, phased-array and ultra-light waveguide technologies, giving the region both demand-side and supply-side relevance. Israel

maintains a strong position in tactical SATCOM technology, particularly in compact electronically pointed and military communications systems.

Asia Pacific is developing as both a manufacturing and demand region. South Korea has strengthened its position through LEO AESA and electronically steered terminal development, while China has a broad group of domestic manufacturers covering flat waveguide arrays, portable mechanically pointed antennas and emerging phased-array terminals. Taiwan participates primarily through RF, phased-array and ODM technology capabilities, while Singapore maintains a presence in defence-oriented manpack systems. Japan, India and Türkiye contain relevant portable SATCOM manufacturers, but the number of products meeting the strict combination of manpack carriage and flat-panel architecture remains more limited.

Competitive Landscape Analysis

The competitive landscape is specialized and technologically fragmented, with competition occurring between dedicated antenna technology companies, defence-electronics groups, portable-terminal manufacturers and vertically integrated SATCOM suppliers. ThinKom, Antenna Research Associates and Get SAT compete through proprietary flat-panel and electronically steered antenna technologies; L3Harris and ELTA combine antenna capability with tactical system integration; Intellian, Satcube, Requitech, Ovzon, ST Engineering and INSTER compete through highly integrated portable terminals; Greenerwave, SWISSto12 and Rapidtek contribute differentiated array and RF architectures. Asian manufacturers, including GLOBAL KONET and a growing group of Chinese suppliers, are expanding the available product base and increasing competition in lower-weight and more cost-sensitive configurations. Competitive advantage is increasingly determined by SWaP performance, satellite-network certification, field deployment speed, RF efficiency, ruggedization, production capability and the ability to support GEO, LEO or multi-orbit networks rather than by antenna aperture size alone.

Report Scope

LP Information, Inc. (LPI) ' newest research report, the "Flat-Panel Antennas for Manpack Satellite Communication Terminals Industry Forecast" looks at past sales and reviews total world Flat-Panel Antennas for Manpack Satellite Communication Terminals sales in 2025, providing a comprehensive analysis by region and market sector of projected Flat-Panel Antennas for Manpack Satellite Communication Terminals sales for 2026 through 2032. With Flat-Panel Antennas for Manpack Satellite

Communication Terminals sales broken down by region, market sector and sub-sector, this report provides a detailed analysis in US\$ millions of the world Flat-Panel Antennas for Manpack Satellite Communication Terminals industry.

This Insight Report provides a comprehensive analysis of the global Flat-Panel Antennas for Manpack Satellite Communication Terminals landscape and highlights key trends related to product segmentation, company formation, revenue, and market share, latest development, and M&A activity. This report also analyzes the strategies of leading global companies with a focus on Flat-Panel Antennas for Manpack Satellite Communication Terminals portfolios and capabilities, market entry strategies, market positions, and geographic footprints, to better understand these firms' unique position in an accelerating global Flat-Panel Antennas for Manpack Satellite Communication Terminals market.

This Insight Report evaluates the key market trends, drivers, and affecting factors shaping the global outlook for Flat-Panel Antennas for Manpack Satellite Communication Terminals and breaks down the forecast by Type, by Application, geography, and market size to highlight emerging pockets of opportunity. With a transparent methodology based on hundreds of bottom-up qualitative and quantitative market inputs, this study forecast offers a highly nuanced view of the current state and future trajectory in the global Flat-Panel Antennas for Manpack Satellite Communication Terminals.

This report presents a comprehensive overview, market shares, and growth opportunities of Flat-Panel Antennas for Manpack Satellite Communication Terminals market by product type, application, key manufacturers and key regions and countries.

Market Segmentation

Segmentation by Type:

Electronically Pointed Flat-Panel Antennas

Motorized Mechanically Pointed Flat-Panel Antennas

Manually Pointed Flat-Panel Antennas

Other

Segmentation by Frequency Band:

X-Band Products

Ku-Band Products

Ka-Band Products

Other

Segmentation by Application:

Dismounted Tactical Command Communications

Disaster Rescue Command Communications

Public Safety Field Command Communications

Critical Infrastructure Field Communications

Field News Gathering Communications

Other

This report also splits the market by region:

Americas

United States

Canada

Mexico

Brazil

APAC

China

Japan

Korea

Southeast Asia

India

Australia

Europe

Germany

France

UK

Italy

Russia

Middle East & Africa

Egypt

South Africa

Israel

Turkey

GCC Countries

The below companies that are profiled have been selected based on inputs gathered from primary experts and analysing the company's coverage, product portfolio, its market penetration.

ThinKom Solutions, Inc.

Antenna Research Associates, Inc.

L3Harris Technologies, Inc.

Get SAT Ltd.

ELTA Systems Ltd.

Requitech AB

Satcube AB

Ovzon AB

GISS Sp. z o.o.

Singapore Technologies Engineering Ltd

INSTER Tecnología y Comunicaciones, S.A.U.

Greenerwave

SWISSto12

Intellian Technologies Inc.

GLOBAL KONET CO., LTD.

Rapidtek Technologies Inc.

China Starwin Science & Technology Co., Ltd.

Shandong Lihang Weixing Tongxin Youxian Gongsi

Zhongzong Xingtong Beijing Wangluo Jishu Youxian Gongsi

Shanghai Hezhen Xinxi Keji Youxian Gongsi

Beijing Sanetel Science and Technology Development CO., LTD.

Gao Jun Beijing Technology Company Limited

Key Questions Addressed in this Report

What is the 10-year outlook for the global Flat-Panel Antennas for Manpack Satellite Communication Terminals market?

What factors are driving Flat-Panel Antennas for Manpack Satellite Communication Terminals market growth, globally and by region?

Which technologies are poised for the fastest growth by market and region?

How do Flat-Panel Antennas for Manpack Satellite Communication Terminals market opportunities vary by end market size?

How does Flat-Panel Antennas for Manpack Satellite Communication Terminals break out by Type, by Application?

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