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Global Manpack Satellite Communication Terminal Market Growth 2026-2032

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Abstracts

The global Manpack Satellite Communication Terminal market size is predicted to grow from US$ 640 million in 2025 to US$ 1165 million in 2032; it is expected to grow at a CAGR of 8.9% from 2026 to 2032.

Manpack Satellite Communication Terminal refers to a compact, ruggedized satellite communications system designed for single-operator carriage and rapid field deployment, integrating the antenna, RF transceiver, modem or baseband functions, power supply, control interface and network connectivity required to establish two-way broadband satellite links. Current products are mainly based on reflector antennas or flat-panel array architectures, commonly supporting X-band, Ku-band, Ka-band or field-configurable multi-band operation. Depending on system architecture, satellite acquisition may use operator-assisted pointing, motorized auto-acquisition or electronically steered arrays, while newer platforms increasingly support LEO, MEO and multi-orbit connectivity alongside conventional GEO services. Typical systems are optimized for backpack transport, short setup times, rugged environmental performance and transmission of voice, IP data, video and command-and-control information. The market primarily serves defense tactical communications, public safety and emergency response, oil and gas and mining field communications, broadcast news gathering, and telecommunications or remote network extension.

Key Findings

Global Manpack Satellite Communication Terminal shipments were approximately 6.65 thousand units in 2025 and are estimated at about 7.25 thousand units in 2026

Weighted OEM selling prices remain around US$98 thousand per unit across 2025 and

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2026

Defense tactical communications represents the dominant downstream demand base, supported by military modernization and resilient beyond-line-of-sight connectivity requirements

Product development is shifting toward lighter flat-panel terminals, electronic beam steering and multi-orbit connectivity

Market Trends

The Manpack Satellite Communication Terminal industry is moving from conventional reflector-based portable VSAT systems toward lighter, more integrated and increasingly software-defined platforms. Product development focuses on lower size, weight and power consumption, faster satellite acquisition, higher throughput, modular X-band, Ku-band and Ka-band configurations, and improved resilience in contested or infrastructure-denied environments. Multi-orbit capability is becoming more important: L3Harris currently offers Panther II with GEO and MEO capability and modular frequency-band configurations, while Intellian launched the AESA-based OW7MP in 2026 for OneWeb LEO government and defense connectivity. These developments indicate that future product differentiation will increasingly depend on rapid deployment, electronic steering, orbit flexibility, ruggedization and network interoperability rather than antenna aperture alone.

Market Dynamics

Drivers

Demand growth is primarily supported by the need for resilient beyond-line-of-sight communications in defense and public safety operations, where terrestrial networks may be unavailable, damaged, congested or exposed to disruption. Military modernization programs are increasing requirements for portable broadband connectivity at the tactical edge, while emergency response agencies, remote industrial operators and field teams require rapidly deployable satellite links for command, video, data and operational coordination. Current military products increasingly emphasize single-operator deployment, rapid setup and access to multiple frequency bands and satellite networks, strengthening the replacement and upgrade cycle for legacy portable terminals.

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Restraints

High equipment cost remains a structural constraint because rugged antennas, high-power RF modules, secure modems, batteries, environmental protection and military-grade qualification materially increase terminal cost relative to mass-market satellite user equipment. Deployment economics are also affected by satellite capacity charges, network certification, training requirements and lifecycle support. For government and defense customers, procurement qualification and security requirements can significantly lengthen commercial cycles, while commercial users in remote industries may compare dedicated Manpack systems with lower-cost portable satellite broadband alternatives.

Opportunities

The most important opportunities are emerging around electronically steered flat-panel terminals, LEO and multi-orbit connectivity, and compact systems capable of switching between satellite networks or frequency bands. Lower terminal weight and simpler acquisition can expand deployment from specialist communications teams to individual tactical units, first responders and field personnel. The integration of LEO connectivity also creates opportunities in missions requiring lower latency and rapid data exchange, while multi-orbit architectures provide additional communications-path diversity for defense and government users. Intellian’s OW7MP, designed for backpack carriage and one-touch LEO network acquisition, illustrates this transition toward more accessible and rapidly deployable satellite broadband terminals.

Challenges

Long-term industry challenges include interoperability across satellite operators, modem ecosystems, frequency bands and military communications standards, together with growing requirements for anti-jam capability, cybersecurity and operation in GNSS-degraded environments. Suppliers must also balance lower weight and power consumption against RF performance, thermal management, battery endurance and environmental durability. Rapid changes in LEO and MEO network architectures create additional technology-refresh risk, requiring terminal manufacturers to maintain compatibility with evolving constellations while protecting customers from premature hardware obsolescence.

Industry Chain Analysis

The upstream industry consists primarily of antenna structures and array modules, RF

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semiconductor devices, BUCs, LNBs, modems and baseband modules, power-management electronics, batteries, positioning and control components, rugged enclosures and specialized mechanical structures. The midstream segment is centered on Manpack Satellite Communication Terminal OEMs responsible for antenna and RF integration, modem compatibility, pointing or beam-steering control, environmental qualification, system software and final assembly. For military products, certification, encryption compatibility and ruggedization contribute substantial additional technical value.

Downstream demand is concentrated in defense tactical communications, public safety and emergency response, remote resource operations, broadcast contribution and telecommunications network extension. Value creation therefore shifts from individual hardware components toward system-level integration, portability, acquisition speed, RF efficiency, network compatibility and reliability under harsh operating conditions. Suppliers with proprietary antenna technologies, RF integration capability, terminal control software and established qualification experience generally have stronger control over complete-product performance and customer relationships.

Segment Insights

By product type, reflector antenna Manpack terminals remain an established product architecture because of mature RF performance, broad satellite compatibility and relatively well-developed supply chains. Flat-panel array terminals are becoming an increasingly important incremental technology direction as electronically scanned antennas reduce mechanical complexity and enable faster acquisition and LEO tracking. By frequency, X-band remains closely associated with dedicated military networks, while Ku-band has broad commercial and government satellite availability and Ka-band supports higher-throughput applications; multi-band platforms address users requiring network flexibility and mission redundancy.

Pointing technology is evolving from operator-assisted and motorized auto-acquisition systems toward electronically steered terminals. Orbit compatibility is changing in parallel: GEO remains an important operating architecture, while LEO and multi-orbit terminals are emerging as a differentiated product group. L3Harris Panther II supports modular X-band, Ku-band and Ka-band configurations and GEO and MEO operation, while Intellian OW7MP demonstrates the commercial introduction of military-grade LEO Manpack terminals.

Downstream Market Opportunities

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Defense tactical communications remains the principal application opportunity, particularly for dismounted soldiers, special forces, forward command posts and rapidly deployable tactical networks. Public safety demand is concentrated in disaster relief, search and rescue and emergency command scenarios, while oil and gas and mining users require communications at remote exploration and operating sites. Broadcast organizations use portable satellite terminals for field contribution where terrestrial networks are inadequate, and telecommunications users deploy them for temporary backhaul and remote network extension. BEL's current BE-MPT positioning for dismounted soldiers, first responders, command and control, disaster relief, special forces and search and rescue demonstrates the overlap between core defense technology and expanding emergency-response requirements.

Regional Insights

North America is a key technology and procurement center for Manpack Satellite Communication Terminal products, supported by substantial defense communications requirements and an established base of tactical SATCOM manufacturers. Europe also represents an important market, with demand influenced by defense modernization, NATO interoperability and growing emphasis on resilient communications, while suppliers in Sweden, the United Kingdom, France, Spain, Poland, Italy and T?rkiye contribute to a diversified regional manufacturing base. Asia-Pacific is characterized by increasing localization of satellite terminal technology, particularly in China, South Korea, India and Singapore, alongside growing government and defense connectivity requirements.

The Middle East, Africa, South America and Central Asia are more significant as downstream deployment markets than as manufacturing centers. Demand in these regions is linked to defense, border security, oil and gas operations, mining, disaster response and communications in areas with limited terrestrial infrastructure. Over the medium term, the regional opportunity is expected to depend increasingly on access to high-throughput satellite capacity and LEO services, combined with the affordability and field reliability of next-generation Manpack terminals.

Competitive Landscape Analysis

The competitive landscape is composed of global defense electronics groups, specialized tactical SATCOM manufacturers and regional satellite terminal OEMs, with competitive positioning differing substantially by customer base and technology architecture. Established suppliers compete through military qualification, secure

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communications integration, multi-band capability and long-term defense procurement relationships, while specialist manufacturers increasingly differentiate through lower terminal weight, rapid deployment, flat-panel antennas and proprietary pointing technologies. Newer LEO-oriented products are adding another layer of competition by shifting differentiation toward electronic beam steering, low-latency connectivity and multi-orbit flexibility. The market also retains a substantial regional component because government procurement, spectrum requirements, information-security standards and local manufacturing policies favor qualified domestic suppliers in several countries. As a result, competition is not determined solely by terminal price; system reliability, network certification, environmental durability, lifecycle support and the ability to integrate antennas, RF subsystems, modems and control software into a complete field-ready terminal remain central competitive factors.

Report Scope

LP Information, Inc. (LPI) ' newest research report, the “Manpack Satellite Communication Terminal Industry Forecast” looks at past sales and reviews total world Manpack Satellite Communication Terminal sales in 2025, providing a comprehensive analysis by region and market sector of projected Manpack Satellite Communication Terminal sales for 2026 through 2032. With Manpack Satellite Communication Terminal sales broken down by region, market sector and sub-sector, this report provides a detailed analysis in US$ millions of the world Manpack Satellite Communication Terminal industry.

This Insight Report provides a comprehensive analysis of the global Manpack Satellite Communication Terminal 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 Manpack Satellite Communication Terminal portfolios and capabilities, market entry strategies, market positions, and geographic footprints, to better understand these firms’ unique position in an accelerating global Manpack Satellite Communication Terminal market.

This Insight Report evaluates the key market trends, drivers, and affecting factors shaping the global outlook for Manpack Satellite Communication Terminal 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 Manpack Satellite

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Communication Terminal.

This report presents a comprehensive overview, market shares, and growth opportunities of Manpack Satellite Communication Terminal market by product type, application, key manufacturers and key regions and countries.

Market Segmentation

Segmentation by Type:

Reflector Antenna Manpack Terminal

Flat-Panel Array Manpack Terminal

Other

Segmentation by Frequency Band:

X-Band Manpack Terminal

Ku-Band Manpack Terminal

Ka-Band Manpack Terminal

Multi-Band Manpack Terminal

Other

Segmentation by Application:

Defense Tactical Communications

Public Safety and Emergency Response

Oil Gas and Mining Field Communications

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Broadcast News Gathering

Telecommunications and Remote Network Extension

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

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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.

Hughes Network Systems, LLC

L3Harris Technologies, Inc.

Viasat, Inc.

Antenna Research Associates, Inc.

Vislink Technologies, Inc.

Norsat International Inc.

Thales

Holkirk Communications Ltd

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Ultra Intelligence & Communications

Paradigm Communication Systems Ltd

Requtech AB

Satcube AB

Ovzon AB

GISS Sp. z o.o.

Indra Sistemas, S.A.

INSTER Tecnolog?a y Comunicaciones, S.A.U.

Temix Communications Srl

ASELSAN A.?.

Pals Electronics A.S.

Profen Defence Technologies

Gilat Satellite Networks Ltd.

Elbit Systems Ltd.

NST New Satellite Technologies

Bharat Electronics Limited

Hanwha Systems Co., Ltd.

Intellian Technologies Inc.

ST Engineering

Rapidtek Technologies Inc.

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AVCON Information Technology Co.,Ltd

Shanghai Highgain Information Technology Corp.,Ltd

Sichuan Andi S&T Industry Co., Ltd.

Jiangsu Anruixun Xinxi Keji Youxian Gongsi

Gao Jun Beijing Technology Company Limited

Cowave Satellite Communication Technology Co., Ltd.

Satpro M&C Tech Co., Ltd.

Nanjing Keyidea Information Technology Co., Ltd.

Zhongzong Xingtong Beijing Wangluo Jishu Youxian Gongsi

Shandong Lihang Weixing Tongxin Youxian Gongsi

Suzhou Aqing Zhineng Keji Youxian Gongsi

Haining Lezhong Information Technology Co., Ltd.

Nanjing China-Spacenet Satellite Telecom Co., Ltd.

Beijing Tiantong Zhongxing Keji Youxian Gongsi

Sichuan Satec Co., Ltd.

Chengdu Coresat Technology Co., Ltd.

China Starwin Science & Technology Co., Ltd.

Key Questions Addressed in this Report

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What is the 10-year outlook for the global Manpack Satellite Communication Terminal market?

What factors are driving Manpack Satellite Communication Terminal market growth, globally and by region?

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

How do Manpack Satellite Communication Terminal market opportunities vary by end market size?

How does Manpack Satellite Communication Terminal break out by Type, by Application?

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Contents

1 SCOPE OF THE REPORT

1.1 Market Introduction
1.2 Years Considered
1.3 Research Objectives
1.4 Market Research Methodology
1.5 Research Process and Data Source
1.6 Economic Indicators
1.7 Currency Considered
1.8 Market Estimation Caveats

2 EXECUTIVE SUMMARY

2.1 World Market Overview
  2.1.1 Global Manpack Satellite Communication Terminal Annual Sales 2021-2032
  2.1.2 World Current & Future Analysis for Manpack Satellite Communication Terminal by Geographic Region, 2021, 2025 & 2032
  2.1.3 World Current & Future Analysis for Manpack Satellite Communication Terminal by Country/Region, 2021, 2025 & 2032
2.2 Manpack Satellite Communication Terminal Segment by Type
  2.2.1 Reflector Antenna Manpack Terminal
  2.2.2 Flat-Panel Array Manpack Terminal
  2.2.3 Other
  2.2.4 Manpack Satellite Communication Terminal Sales by Type
    2.2.4.1 Global Manpack Satellite Communication Terminal Sales Market Share by Type (2021-2026)
    2.2.4.2 Global Manpack Satellite Communication Terminal Revenue and Market Share by Type (2021-2026)
    2.2.4.3 Global Manpack Satellite Communication Terminal Sale Price by Type (2021-2026)
2.3 Manpack Satellite Communication Terminal Segment by Frequency Band
  2.3.1 X-Band Manpack Terminal
  2.3.2 Ku-Band Manpack Terminal
  2.3.3 Ka-Band Manpack Terminal
  2.3.4 Multi-Band Manpack Terminal
  2.3.5 Other
  2.3.6 Manpack Satellite Communication Terminal Sales by Frequency Band

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2.3.6.1 Global Manpack Satellite Communication Terminal Sales Market Share by Frequency Band (2021-2026)
2.3.6.2 Global Manpack Satellite Communication Terminal Revenue and Market Share by Frequency Band (2021-2026)
2.3.6.3 Global Manpack Satellite Communication Terminal Sale Price by Frequency Band (2021-2026)
2.4 Manpack Satellite Communication Terminal Segment by Application
2.4.1 Defense Tactical Communications
2.4.2 Public Safety and Emergency Response
2.4.3 Oil Gas and Mining Field Communications
2.4.4 Broadcast News Gathering
2.4.5 Telecommunications and Remote Network Extension
2.4.6 Other
2.4.7 Manpack Satellite Communication Terminal Sales by Application
2.4.7.1 Global Manpack Satellite Communication Terminal Sale Market Share by Application (2021-2026)
2.4.7.2 Global Manpack Satellite Communication Terminal Revenue and Market Share by Application (2021-2026)
2.4.7.3 Global Manpack Satellite Communication Terminal Sale Price by Application (2021-2026)

3 GLOBAL BY COMPANY

3.1 Global Manpack Satellite Communication Terminal Breakdown Data by Company
3.1.1 Global Manpack Satellite Communication Terminal Annual Sales by Company (2021-2026)
3.1.2 Global Manpack Satellite Communication Terminal Sales Market Share by Company (2021-2026)
3.2 Global Manpack Satellite Communication Terminal Annual Revenue by Company (2021-2026)
3.2.1 Global Manpack Satellite Communication Terminal Revenue by Company (2021-2026)
3.2.2 Global Manpack Satellite Communication Terminal Revenue Market Share by Company (2021-2026)
3.3 Global Manpack Satellite Communication Terminal Sale Price by Company
3.4 Key Manufacturers Manpack Satellite Communication Terminal Producing Area Distribution, Sales Area, Product Type
3.4.1 Key Manufacturers Manpack Satellite Communication Terminal Product Location Distribution

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info@marketpublishers.com

3.4.2 Players Manpack Satellite Communication Terminal Products Offered
3.5 Market Concentration Rate Analysis
3.5.1 Competition Landscape Analysis
3.5.2 Concentration Ratio (CR3, CR5 and CR10) & (2024-2026)
3.6 New Products and Potential Entrants
3.7 Market M&A Activity & Strategy

4 WORLD HISTORIC REVIEW FOR MANPACK SATELLITE COMMUNICATION TERMINAL BY GEOGRAPHIC REGION

4.1 World Historic Manpack Satellite Communication Terminal Market Size by Geographic Region (2021-2026)
4.1.1 Global Manpack Satellite Communication Terminal Annual Sales by Geographic Region (2021-2026)
4.1.2 Global Manpack Satellite Communication Terminal Annual Revenue by Geographic Region (2021-2026)
4.2 World Historic Manpack Satellite Communication Terminal Market Size by Country/Region (2021-2026)
4.2.1 Global Manpack Satellite Communication Terminal Annual Sales by Country/Region (2021-2026)
4.2.2 Global Manpack Satellite Communication Terminal Annual Revenue by Country/Region (2021-2026)
4.3 Americas Manpack Satellite Communication Terminal Sales Growth
4.4 APAC Manpack Satellite Communication Terminal Sales Growth
4.5 Europe Manpack Satellite Communication Terminal Sales Growth
4.6 Middle East & Africa Manpack Satellite Communication Terminal Sales Growth

5 AMERICAS

5.1 Americas Manpack Satellite Communication Terminal Sales by Country
5.1.1 Americas Manpack Satellite Communication Terminal Sales by Country (2021-2026)
5.1.2 Americas Manpack Satellite Communication Terminal Revenue by Country (2021-2026)
5.2 Americas Manpack Satellite Communication Terminal Sales by Type (2021-2026)
5.3 Americas Manpack Satellite Communication Terminal Sales by Application (2021-2026)
5.4 United States
5.5 Canada

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5.6 Mexico
5.7 Brazil

6 APAC

6.1 APAC Manpack Satellite Communication Terminal Sales by Region
6.1.1 APAC Manpack Satellite Communication Terminal Sales by Region (2021-2026)
6.1.2 APAC Manpack Satellite Communication Terminal Revenue by Region (2021-2026)
6.2 APAC Manpack Satellite Communication Terminal Sales by Type (2021-2026)
6.3 APAC Manpack Satellite Communication Terminal Sales by Application (2021-2026)
6.4 China
6.5 Japan
6.6 South Korea
6.7 Southeast Asia
6.8 India
6.9 Australia
6.10 China Taiwan

7 EUROPE

7.1 Europe Manpack Satellite Communication Terminal by Country
7.1.1 Europe Manpack Satellite Communication Terminal Sales by Country (2021-2026)
7.1.2 Europe Manpack Satellite Communication Terminal Revenue by Country (2021-2026)
7.2 Europe Manpack Satellite Communication Terminal Sales by Type (2021-2026)
7.3 Europe Manpack Satellite Communication Terminal Sales by Application (2021-2026)
7.4 Germany
7.5 France
7.6 UK
7.7 Italy
7.8 Russia

8 MIDDLE EAST & AFRICA

8.1 Middle East & Africa Manpack Satellite Communication Terminal by Country
8.1.1 Middle East & Africa Manpack Satellite Communication Terminal Sales by

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Country (2021-2026)
8.1.2 Middle East & Africa Manpack Satellite Communication Terminal Revenue by Country (2021-2026)
8.2 Middle East & Africa Manpack Satellite Communication Terminal Sales by Type (2021-2026)
8.3 Middle East & Africa Manpack Satellite Communication Terminal Sales by Application (2021-2026)
8.4 Egypt
8.5 South Africa
8.6 Israel
8.7 Turkey
8.8 GCC Countries

9 MARKET DRIVERS, CHALLENGES AND TRENDS

9.1 Market Drivers & Growth Opportunities
9.2 Market Challenges & Risks
9.3 Industry Trends

10 MANUFACTURING COST STRUCTURE ANALYSIS

10.1 Raw Material and Suppliers
10.2 Manufacturing Cost Structure Analysis of Manpack Satellite Communication Terminal
10.3 Manufacturing Process Analysis of Manpack Satellite Communication Terminal
10.4 Industry Chain Structure of Manpack Satellite Communication Terminal

11 MARKETING, DISTRIBUTORS AND CUSTOMER

11.1 Sales Channel
11.1.1 Direct Channels
11.1.2 Indirect Channels
11.2 Manpack Satellite Communication Terminal Distributors
11.3 Manpack Satellite Communication Terminal Customer

12 WORLD FORECAST REVIEW FOR MANPACK SATELLITE COMMUNICATION TERMINAL BY GEOGRAPHIC REGION

12.1 Global Manpack Satellite Communication Terminal Market Size Forecast by

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Region
12.1.1 Global Manpack Satellite Communication Terminal Forecast by Region (2027-2032)
12.1.2 Global Manpack Satellite Communication Terminal Annual Revenue Forecast by Region (2027-2032)
12.2 Americas Forecast by Country (2027-2032)
12.3 APAC Forecast by Region (2027-2032)
12.4 Europe Forecast by Country (2027-2032)
12.5 Middle East & Africa Forecast by Country (2027-2032)
12.6 Global Manpack Satellite Communication Terminal Forecast by Type (2027-2032)
12.7 Global Manpack Satellite Communication Terminal Forecast by Application (2027-2032)

13 KEY PLAYERS ANALYSIS

13.1 Hughes Network Systems, LLC
13.1.1 Hughes Network Systems, LLC Company Information
13.1.2 Hughes Network Systems, LLC Manpack Satellite Communication Terminal Product Portfolios and Specifications
13.1.3 Hughes Network Systems, LLC Manpack Satellite Communication Terminal Sales, Revenue, Price and Gross Margin (2021-2026)
13.1.4 Hughes Network Systems, LLC Main Business Overview
13.1.5 Hughes Network Systems, LLC Latest Developments
13.2 L3Harris Technologies, Inc.
13.2.1 L3Harris Technologies, Inc. Company Information
13.2.2 L3Harris Technologies, Inc. Manpack Satellite Communication Terminal Product Portfolios and Specifications
13.2.3 L3Harris Technologies, Inc. Manpack Satellite Communication Terminal Sales, Revenue, Price and Gross Margin (2021-2026)
13.2.4 L3Harris Technologies, Inc. Main Business Overview
13.2.5 L3Harris Technologies, Inc. Latest Developments
13.3 Viasat, Inc.
13.3.1 Viasat, Inc. Company Information
13.3.2 Viasat, Inc. Manpack Satellite Communication Terminal Product Portfolios and Specifications
13.3.3 Viasat, Inc. Manpack Satellite Communication Terminal Sales, Revenue, Price and Gross Margin (2021-2026)
13.3.4 Viasat, Inc. Main Business Overview
13.3.5 Viasat, Inc. Latest Developments

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13.4 Antenna Research Associates, Inc.
13.4.1 Antenna Research Associates, Inc. Company Information
13.4.2 Antenna Research Associates, Inc. Manpack Satellite Communication Terminal Product Portfolios and Specifications
13.4.3 Antenna Research Associates, Inc. Manpack Satellite Communication Terminal Sales, Revenue, Price and Gross Margin (2021-2026)
13.4.4 Antenna Research Associates, Inc. Main Business Overview
13.4.5 Antenna Research Associates, Inc. Latest Developments
13.5 Vislink Technologies, Inc.
13.5.1 Vislink Technologies, Inc. Company Information
13.5.2 Vislink Technologies, Inc. Manpack Satellite Communication Terminal Product Portfolios and Specifications
13.5.3 Vislink Technologies, Inc. Manpack Satellite Communication Terminal Sales, Revenue, Price and Gross Margin (2021-2026)
13.5.4 Vislink Technologies, Inc. Main Business Overview
13.5.5 Vislink Technologies, Inc. Latest Developments
13.6 Norsat International Inc.
13.6.1 Norsat International Inc. Company Information
13.6.2 Norsat International Inc. Manpack Satellite Communication Terminal Product Portfolios and Specifications
13.6.3 Norsat International Inc. Manpack Satellite Communication Terminal Sales, Revenue, Price and Gross Margin (2021-2026)
13.6.4 Norsat International Inc. Main Business Overview
13.6.5 Norsat International Inc. Latest Developments
13.7 Thales
13.7.1 Thales Company Information
13.7.2 Thales Manpack Satellite Communication Terminal Product Portfolios and Specifications
13.7.3 Thales Manpack Satellite Communication Terminal Sales, Revenue, Price and Gross Margin (2021-2026)
13.7.4 Thales Main Business Overview
13.7.5 Thales Latest Developments
13.8 Holkirk Communications Ltd
13.8.1 Holkirk Communications Ltd Company Information
13.8.2 Holkirk Communications Ltd Manpack Satellite Communication Terminal Product Portfolios and Specifications
13.8.3 Holkirk Communications Ltd Manpack Satellite Communication Terminal Sales, Revenue, Price and Gross Margin (2021-2026)
13.8.4 Holkirk Communications Ltd Main Business Overview

+357 96 030922
info@marketpublishers.com

13.8.5 Holkirk Communications Ltd Latest Developments
13.9 Ultra Intelligence & Communications
13.9.1 Ultra Intelligence & Communications Company Information
13.9.2 Ultra Intelligence & Communications Manpack Satellite Communication Terminal Product Portfolios and Specifications
13.9.3 Ultra Intelligence & Communications Manpack Satellite Communication Terminal Sales, Revenue, Price and Gross Margin (2021-2026)
13.9.4 Ultra Intelligence & Communications Main Business Overview
13.9.5 Ultra Intelligence & Communications Latest Developments
13.10 Paradigm Communication Systems Ltd
13.10.1 Paradigm Communication Systems Ltd Company Information
13.10.2 Paradigm Communication Systems Ltd Manpack Satellite Communication Terminal Product Portfolios and Specifications
13.10.3 Paradigm Communication Systems Ltd Manpack Satellite Communication Terminal Sales, Revenue, Price and Gross Margin (2021-2026)
13.10.4 Paradigm Communication Systems Ltd Main Business Overview
13.10.5 Paradigm Communication Systems Ltd Latest Developments
13.11 Requtech AB
13.11.1 Requtech AB Company Information
13.11.2 Requtech AB Manpack Satellite Communication Terminal Product Portfolios and Specifications
13.11.3 Requtech AB Manpack Satellite Communication Terminal Sales, Revenue, Price and Gross Margin (2021-2026)
13.11.4 Requtech AB Main Business Overview
13.11.5 Requtech AB Latest Developments
13.12 Satcube AB
13.12.1 Satcube AB Company Information
13.12.2 Satcube AB Manpack Satellite Communication Terminal Product Portfolios and Specifications
13.12.3 Satcube AB Manpack Satellite Communication Terminal Sales, Revenue, Price and Gross Margin (2021-2026)
13.12.4 Satcube AB Main Business Overview
13.12.5 Satcube AB Latest Developments
13.13 Ovzon AB
13.13.1 Ovzon AB Company Information
13.13.2 Ovzon AB Manpack Satellite Communication Terminal Product Portfolios and Specifications
13.13.3 Ovzon AB Manpack Satellite Communication Terminal Sales, Revenue, Price and Gross Margin (2021-2026)

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13.13.4 Ovzon AB Main Business Overview
13.13.5 Ovzon AB Latest Developments
13.14 GISS Sp. z o.o.
13.14.1 GISS Sp. z o.o. Company Information
13.14.2 GISS Sp. z o.o. Manpack Satellite Communication Terminal Product Portfolios and Specifications
13.14.3 GISS Sp. z o.o. Manpack Satellite Communication Terminal Sales, Revenue, Price and Gross Margin (2021-2026)
13.14.4 GISS Sp. z o.o. Main Business Overview
13.14.5 GISS Sp. z o.o. Latest Developments
13.15 Indra Sistemas, S.A.
13.15.1 Indra Sistemas, S.A. Company Information
13.15.2 Indra Sistemas, S.A. Manpack Satellite Communication Terminal Product Portfolios and Specifications
13.15.3 Indra Sistemas, S.A. Manpack Satellite Communication Terminal Sales, Revenue, Price and Gross Margin (2021-2026)
13.15.4 Indra Sistemas, S.A. Main Business Overview
13.15.5 Indra Sistemas, S.A. Latest Developments
13.16 INSTER Tecnolog?a y Comunicaciones, S.A.U.
13.16.1 INSTER Tecnolog?a y Comunicaciones, S.A.U. Company Information
13.16.2 INSTER Tecnolog?a y Comunicaciones, S.A.U. Manpack Satellite Communication Terminal Product Portfolios and Specifications
13.16.3 INSTER Tecnolog?a y Comunicaciones, S.A.U. Manpack Satellite Communication Terminal Sales, Revenue, Price and Gross Margin (2021-2026)
13.16.4 INSTER Tecnolog?a y Comunicaciones, S.A.U. Main Business Overview
13.16.5 INSTER Tecnolog?a y Comunicaciones, S.A.U. Latest Developments
13.17 Temix Communications Srl
13.17.1 Temix Communications Srl Company Information
13.17.2 Temix Communications Srl Manpack Satellite Communication Terminal Product Portfolios and Specifications
13.17.3 Temix Communications Srl Manpack Satellite Communication Terminal Sales, Revenue, Price and Gross Margin (2021-2026)
13.17.4 Temix Communications Srl Main Business Overview
13.17.5 Temix Communications Srl Latest Developments
13.18 ASELSAN A.?.
13.18.1 ASELSAN A.?. Company Information
13.18.2 ASELSAN A.?. Manpack Satellite Communication Terminal Product Portfolios and Specifications
13.18.3 ASELSAN A.?. Manpack Satellite Communication Terminal Sales, Revenue,

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Price and Gross Margin (2021-2026)
13.18.4 ASELSAN A.?. Main Business Overview
13.18.5 ASELSAN A.?. Latest Developments
13.19 Pals Electronics A.S.
13.19.1 Pals Electronics A.S. Company Information
13.19.2 Pals Electronics A.S. Manpack Satellite Communication Terminal Product Portfolios and Specifications
13.19.3 Pals Electronics A.S. Manpack Satellite Communication Terminal Sales, Revenue, Price and Gross Margin (2021-2026)
13.19.4 Pals Electronics A.S. Main Business Overview
13.19.5 Pals Electronics A.S. Latest Developments
13.20 Profen Defence Technologies
13.20.1 Profen Defence Technologies Company Information
13.20.2 Profen Defence Technologies Manpack Satellite Communication Terminal Product Portfolios and Specifications
13.20.3 Profen Defence Technologies Manpack Satellite Communication Terminal Sales, Revenue, Price and Gross Margin (2021-2026)
13.20.4 Profen Defence Technologies Main Business Overview
13.20.5 Profen Defence Technologies Latest Developments
13.21 Gilat Satellite Networks Ltd.
13.21.1 Gilat Satellite Networks Ltd. Company Information
13.21.2 Gilat Satellite Networks Ltd. Manpack Satellite Communication Terminal Product Portfolios and Specifications
13.21.3 Gilat Satellite Networks Ltd. Manpack Satellite Communication Terminal Sales, Revenue, Price and Gross Margin (2021-2026)
13.21.4 Gilat Satellite Networks Ltd. Main Business Overview
13.21.5 Gilat Satellite Networks Ltd. Latest Developments
13.22 Elbit Systems Ltd.
13.22.1 Elbit Systems Ltd. Company Information
13.22.2 Elbit Systems Ltd. Manpack Satellite Communication Terminal Product Portfolios and Specifications
13.22.3 Elbit Systems Ltd. Manpack Satellite Communication Terminal Sales, Revenue, Price and Gross Margin (2021-2026)
13.22.4 Elbit Systems Ltd. Main Business Overview
13.22.5 Elbit Systems Ltd. Latest Developments
13.23 NST New Satellite Technologies
13.23.1 NST New Satellite Technologies Company Information
13.23.2 NST New Satellite Technologies Manpack Satellite Communication Terminal Product Portfolios and Specifications

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13.23.3 NST New Satellite Technologies Manpack Satellite Communication Terminal Sales, Revenue, Price and Gross Margin (2021-2026)
13.23.4 NST New Satellite Technologies Main Business Overview
13.23.5 NST New Satellite Technologies Latest Developments
13.24 Bharat Electronics Limited
13.24.1 Bharat Electronics Limited Company Information
13.24.2 Bharat Electronics Limited Manpack Satellite Communication Terminal Product Portfolios and Specifications
13.24.3 Bharat Electronics Limited Manpack Satellite Communication Terminal Sales, Revenue, Price and Gross Margin (2021-2026)
13.24.4 Bharat Electronics Limited Main Business Overview
13.24.5 Bharat Electronics Limited Latest Developments
13.25 Hanwha Systems Co., Ltd.
13.25.1 Hanwha Systems Co., Ltd. Company Information
13.25.2 Hanwha Systems Co., Ltd. Manpack Satellite Communication Terminal Product Portfolios and Specifications
13.25.3 Hanwha Systems Co., Ltd. Manpack Satellite Communication Terminal Sales, Revenue, Price and Gross Margin (2021-2026)
13.25.4 Hanwha Systems Co., Ltd. Main Business Overview
13.25.5 Hanwha Systems Co., Ltd. Latest Developments
13.26 Intellian Technologies Inc.
13.26.1 Intellian Technologies Inc. Company Information
13.26.2 Intellian Technologies Inc. Manpack Satellite Communication Terminal Product Portfolios and Specifications
13.26.3 Intellian Technologies Inc. Manpack Satellite Communication Terminal Sales, Revenue, Price and Gross Margin (2021-2026)
13.26.4 Intellian Technologies Inc. Main Business Overview
13.26.5 Intellian Technologies Inc. Latest Developments
13.27 ST Engineering
13.27.1 ST Engineering Company Information
13.27.2 ST Engineering Manpack Satellite Communication Terminal Product Portfolios and Specifications
13.27.3 ST Engineering Manpack Satellite Communication Terminal Sales, Revenue, Price and Gross Margin (2021-2026)
13.27.4 ST Engineering Main Business Overview
13.27.5 ST Engineering Latest Developments
13.28 Rapidtek Technologies Inc.
13.28.1 Rapidtek Technologies Inc. Company Information
13.28.2 Rapidtek Technologies Inc. Manpack Satellite Communication Terminal

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Product Portfolios and Specifications
13.28.3 Rapidtek Technologies Inc. Manpack Satellite Communication Terminal Sales, Revenue, Price and Gross Margin (2021-2026)
13.28.4 Rapidtek Technologies Inc. Main Business Overview
13.28.5 Rapidtek Technologies Inc. Latest Developments
13.29 AVCON Information Technology Co.,Ltd
13.29.1 AVCON Information Technology Co.,Ltd Company Information
13.29.2 AVCON Information Technology Co.,Ltd Manpack Satellite Communication Terminal Product Portfolios and Specifications
13.29.3 AVCON Information Technology Co.,Ltd Manpack Satellite Communication Terminal Sales, Revenue, Price and Gross Margin (2021-2026)
13.29.4 AVCON Information Technology Co.,Ltd Main Business Overview
13.29.5 AVCON Information Technology Co.,Ltd Latest Developments
13.30 Shanghai Highgain Information Technology Corp.,Ltd
13.30.1 Shanghai Highgain Information Technology Corp.,Ltd Company Information
13.30.2 Shanghai Highgain Information Technology Corp.,Ltd Manpack Satellite Communication Terminal Product Portfolios and Specifications
13.30.3 Shanghai Highgain Information Technology Corp.,Ltd Manpack Satellite Communication Terminal Sales, Revenue, Price and Gross Margin (2021-2026)
13.30.4 Shanghai Highgain Information Technology Corp.,Ltd Main Business Overview
13.30.5 Shanghai Highgain Information Technology Corp.,Ltd Latest Developments
13.31 Sichuan Andi S&T Industry Co., Ltd.
13.31.1 Sichuan Andi S&T Industry Co., Ltd. Company Information
13.31.2 Sichuan Andi S&T Industry Co., Ltd. Manpack Satellite Communication Terminal Product Portfolios and Specifications
13.31.3 Sichuan Andi S&T Industry Co., Ltd. Manpack Satellite Communication Terminal Sales, Revenue, Price and Gross Margin (2021-2026)
13.31.4 Sichuan Andi S&T Industry Co., Ltd. Main Business Overview
13.31.5 Sichuan Andi S&T Industry Co., Ltd. Latest Developments
13.32 Jiangsu Anruixun Xinxi Keji Youxian Gongsi
13.32.1 Jiangsu Anruixun Xinxi Keji Youxian Gongsi Company Information
13.32.2 Jiangsu Anruixun Xinxi Keji Youxian Gongsi Manpack Satellite Communication Terminal Product Portfolios and Specifications
13.32.3 Jiangsu Anruixun Xinxi Keji Youxian Gongsi Manpack Satellite Communication Terminal Sales, Revenue, Price and Gross Margin (2021-2026)
13.32.4 Jiangsu Anruixun Xinxi Keji Youxian Gongsi Main Business Overview
13.32.5 Jiangsu Anruixun Xinxi Keji Youxian Gongsi Latest Developments
13.33 Gao Jun Beijing Technology Company Limited
13.33.1 Gao Jun Beijing Technology Company Limited Company Information

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13.33.2 Gao Jun Beijing Technology Company Limited Manpack Satellite Communication Terminal Product Portfolios and Specifications
13.33.3 Gao Jun Beijing Technology Company Limited Manpack Satellite Communication Terminal Sales, Revenue, Price and Gross Margin (2021-2026)
13.33.4 Gao Jun Beijing Technology Company Limited Main Business Overview
13.33.5 Gao Jun Beijing Technology Company Limited Latest Developments
13.34 Cowave Satellite Communication Technology Co., Ltd.
13.34.1 Cowave Satellite Communication Technology Co., Ltd. Company Information
13.34.2 Cowave Satellite Communication Technology Co., Ltd. Manpack Satellite Communication Terminal Product Portfolios and Specifications
13.34.3 Cowave Satellite Communication Technology Co., Ltd. Manpack Satellite Communication Terminal Sales, Revenue, Price and Gross Margin (2021-2026)
13.34.4 Cowave Satellite Communication Technology Co., Ltd. Main Business Overview
13.34.5 Cowave Satellite Communication Technology Co., Ltd. Latest Developments
13.35 Satpro M&C Tech Co., Ltd.
13.35.1 Satpro M&C Tech Co., Ltd. Company Information
13.35.2 Satpro M&C Tech Co., Ltd. Manpack Satellite Communication Terminal Product Portfolios and Specifications
13.35.3 Satpro M&C Tech Co., Ltd. Manpack Satellite Communication Terminal Sales, Revenue, Price and Gross Margin (2021-2026)
13.35.4 Satpro M&C Tech Co., Ltd. Main Business Overview
13.35.5 Satpro M&C Tech Co., Ltd. Latest Developments
13.36 Nanjing Keyidea Information Technology Co., Ltd.
13.36.1 Nanjing Keyidea Information Technology Co., Ltd. Company Information
13.36.2 Nanjing Keyidea Information Technology Co., Ltd. Manpack Satellite Communication Terminal Product Portfolios and Specifications
13.36.3 Nanjing Keyidea Information Technology Co., Ltd. Manpack Satellite Communication Terminal Sales, Revenue, Price and Gross Margin (2021-2026)
13.36.4 Nanjing Keyidea Information Technology Co., Ltd. Main Business Overview
13.36.5 Nanjing Keyidea Information Technology Co., Ltd. Latest Developments
13.37 Zhongzong Xingtong Beijing Wangluo Jishu Youxian Gongsi
13.37.1 Zhongzong Xingtong Beijing Wangluo Jishu Youxian Gongsi Company Information
13.37.2 Zhongzong Xingtong Beijing Wangluo Jishu Youxian Gongsi Manpack Satellite Communication Terminal Product Portfolios and Specifications
13.37.3 Zhongzong Xingtong Beijing Wangluo Jishu Youxian Gongsi Manpack Satellite Communication Terminal Sales, Revenue, Price and Gross Margin (2021-2026)

13.37.4 Zhongzong Xingtong Beijing Wangluo Jishu Youxian Gongsi Main Business Overview
13.37.5 Zhongzong Xingtong Beijing Wangluo Jishu Youxian Gongsi Latest Developments
13.38 Shandong Lihang Weixing Tongxin Youxian Gongsi
13.38.1 Shandong Lihang Weixing Tongxin Youxian Gongsi Company Information
13.38.2 Shandong Lihang Weixing Tongxin Youxian Gongsi Manpack Satellite Communication Terminal Product Portfolios and Specifications
13.38.3 Shandong Lihang Weixing Tongxin Youxian Gongsi Manpack Satellite Communication Terminal Sales, Revenue, Price and Gross Margin (2021-2026)
13.38.4 Shandong Lihang Weixing Tongxin Youxian Gongsi Main Business Overview
13.38.5 Shandong Lihang Weixing Tongxin Youxian Gongsi Latest Developments
13.39 Suzhou Aqing Zhineng Keji Youxian Gongsi
13.39.1 Suzhou Aqing Zhineng Keji Youxian Gongsi Company Information
13.39.2 Suzhou Aqing Zhineng Keji Youxian Gongsi Manpack Satellite Communication Terminal Product Portfolios and Specifications
13.39.3 Suzhou Aqing Zhineng Keji Youxian Gongsi Manpack Satellite Communication Terminal Sales, Revenue, Price and Gross Margin (2021-2026)
13.39.4 Suzhou Aqing Zhineng Keji Youxian Gongsi Main Business Overview
13.39.5 Suzhou Aqing Zhineng Keji Youxian Gongsi Latest Developments
13.40 Haining Lezhong Information Technology Co., Ltd.
13.40.1 Haining Lezhong Information Technology Co., Ltd. Company Information
13.40.2 Haining Lezhong Information Technology Co., Ltd. Manpack Satellite Communication Terminal Product Portfolios and Specifications
13.40.3 Haining Lezhong Information Technology Co., Ltd. Manpack Satellite Communication Terminal Sales, Revenue, Price and Gross Margin (2021-2026)
13.40.4 Haining Lezhong Information Technology Co., Ltd. Main Business Overview
13.40.5 Haining Lezhong Information Technology Co., Ltd. Latest Developments
13.41 Nanjing China-Spacenet Satellite Telecom Co., Ltd.
13.41.1 Nanjing China-Spacenet Satellite Telecom Co., Ltd. Company Information
13.41.2 Nanjing China-Spacenet Satellite Telecom Co., Ltd. Manpack Satellite Communication Terminal Product Portfolios and Specifications
13.41.3 Nanjing China-Spacenet Satellite Telecom Co., Ltd. Manpack Satellite Communication Terminal Sales, Revenue, Price and Gross Margin (2021-2026)
13.41.4 Nanjing China-Spacenet Satellite Telecom Co., Ltd. Main Business Overview
13.41.5 Nanjing China-Spacenet Satellite Telecom Co., Ltd. Latest Developments
13.42 Beijing Tiantong Zhongxing Keji Youxian Gongsi
13.42.1 Beijing Tiantong Zhongxing Keji Youxian Gongsi Company Information
13.42.2 Beijing Tiantong Zhongxing Keji Youxian Gongsi Manpack Satellite

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Communication Terminal Product Portfolios and Specifications
13.42.3 Beijing Tiantong Zhongxing Keji Youxian Gongsi Manpack Satellite Communication Terminal Sales, Revenue, Price and Gross Margin (2021-2026)
13.42.4 Beijing Tiantong Zhongxing Keji Youxian Gongsi Main Business Overview
13.42.5 Beijing Tiantong Zhongxing Keji Youxian Gongsi Latest Developments
13.43 Sichuan Satec Co., Ltd.
13.43.1 Sichuan Satec Co., Ltd. Company Information
13.43.2 Sichuan Satec Co., Ltd. Manpack Satellite Communication Terminal Product Portfolios and Specifications
13.43.3 Sichuan Satec Co., Ltd. Manpack Satellite Communication Terminal Sales, Revenue, Price and Gross Margin (2021-2026)
13.43.4 Sichuan Satec Co., Ltd. Main Business Overview
13.43.5 Sichuan Satec Co., Ltd. Latest Developments
13.44 Chengdu Coresat Technology Co., Ltd.
13.44.1 Chengdu Coresat Technology Co., Ltd. Company Information
13.44.2 Chengdu Coresat Technology Co., Ltd. Manpack Satellite Communication Terminal Product Portfolios and Specifications
13.44.3 Chengdu Coresat Technology Co., Ltd. Manpack Satellite Communication Terminal Sales, Revenue, Price and Gross Margin (2021-2026)
13.44.4 Chengdu Coresat Technology Co., Ltd. Main Business Overview
13.44.5 Chengdu Coresat Technology Co., Ltd. Latest Developments
13.45 China Starwin Science & Technology Co., Ltd.
13.45.1 China Starwin Science & Technology Co., Ltd. Company Information
13.45.2 China Starwin Science & Technology Co., Ltd. Manpack Satellite Communication Terminal Product Portfolios and Specifications
13.45.3 China Starwin Science & Technology Co., Ltd. Manpack Satellite Communication Terminal Sales, Revenue, Price and Gross Margin (2021-2026)
13.45.4 China Starwin Science & Technology Co., Ltd. Main Business Overview
13.45.5 China Starwin Science & Technology Co., Ltd. Latest Developments

14 RESEARCH FINDINGS AND CONCLUSION

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List Of Tables

LIST OF TABLES

Table 1. Manpack Satellite Communication Terminal Annual Sales CAGR by Geographic Region (2021, 2025 & 2032) & ($ millions)
Table 2. Manpack Satellite Communication Terminal Annual Sales CAGR by Country/Region (2021, 2025 & 2032) & ($ millions)
Table 3. Major Players of Reflector Antenna Manpack Terminal
Table 4. Major Players of Flat-Panel Array Manpack Terminal
Table 5. Major Players of Other
Table 6. Global Manpack Satellite Communication Terminal Sales by Type (2021-2026) & (Units)
Table 7. Global Manpack Satellite Communication Terminal Sales Market Share by Type (2021-2026)
Table 8. Global Manpack Satellite Communication Terminal Revenue by Type (2021-2026) & ($ million)
Table 9. Global Manpack Satellite Communication Terminal Revenue Market Share by Type (2021-2026)
Table 10. Global Manpack Satellite Communication Terminal Sale Price by Type (2021-2026) & (US$/Unit)
Table 11. Major Players of X-Band Manpack Terminal
Table 12. Major Players of Ku-Band Manpack Terminal
Table 13. Major Players of Ka-Band Manpack Terminal
Table 14. Major Players of Multi-Band Manpack Terminal
Table 15. Major Players of Other
Table 16. Global Manpack Satellite Communication Terminal Sales by Frequency Band (2021-2026) & (Units)
Table 17. Global Manpack Satellite Communication Terminal Sales Market Share by Frequency Band (2021-2026)
Table 18. Global Manpack Satellite Communication Terminal Revenue by Frequency Band (2021-2026) & ($ million)
Table 19. Global Manpack Satellite Communication Terminal Revenue Market Share by Frequency Band (2021-2026)
Table 20. Global Manpack Satellite Communication Terminal Sale Price by Frequency Band (2021-2026) & (US$/Unit)
Table 21. Global Manpack Satellite Communication Terminal Sale by Application (2021-2026) & (Units)
Table 22. Global Manpack Satellite Communication Terminal Sale Market Share by

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Application (2021-2026)
Table 23. Global Manpack Satellite Communication Terminal Revenue by Application (2021-2026) & ($ million)
Table 24. Global Manpack Satellite Communication Terminal Revenue Market Share by Application (2021-2026)
Table 25. Global Manpack Satellite Communication Terminal Sale Price by Application (2021-2026) & (US$/Unit)
Table 26. Global Manpack Satellite Communication Terminal Sales by Company (2021-2026) & (Units)
Table 27. Global Manpack Satellite Communication Terminal Sales Market Share by Company (2021-2026)
Table 28. Global Manpack Satellite Communication Terminal Revenue by Company (2021-2026) & ($ millions)
Table 29. Global Manpack Satellite Communication Terminal Revenue Market Share by Company (2021-2026)
Table 30. Global Manpack Satellite Communication Terminal Sale Price by Company (2021-2026) & (US$/Unit)
Table 31. Key Manufacturers Manpack Satellite Communication Terminal Producing Area Distribution and Sales Area
Table 32. Players Manpack Satellite Communication Terminal Products Offered
Table 33. Manpack Satellite Communication Terminal Concentration Ratio (CR3, CR5 and CR10) & (2024-2026)
Table 34. New Products and Potential Entrants
Table 35. Market M&A Activity & Strategy
Table 36. Global Manpack Satellite Communication Terminal Sales by Geographic Region (2021-2026) & (Units)
Table 37. Global Manpack Satellite Communication Terminal Sales Market Share Geographic Region (2021-2026)
Table 38. Global Manpack Satellite Communication Terminal Revenue by Geographic Region (2021-2026) & ($ millions)
Table 39. Global Manpack Satellite Communication Terminal Revenue Market Share by Geographic Region (2021-2026)
Table 40. Global Manpack Satellite Communication Terminal Sales by Country/Region (2021-2026) & (Units)
Table 41. Global Manpack Satellite Communication Terminal Sales Market Share by Country/Region (2021-2026)
Table 42. Global Manpack Satellite Communication Terminal Revenue by Country/Region (2021-2026) & ($ millions)
Table 43. Global Manpack Satellite Communication Terminal Revenue Market Share by

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Country/Region (2021-2026)
Table 44. Americas Manpack Satellite Communication Terminal Sales by Country (2021-2026) & (Units)
Table 45. Americas Manpack Satellite Communication Terminal Sales Market Share by Country (2021-2026)
Table 46. Americas Manpack Satellite Communication Terminal Revenue by Country (2021-2026) & ($ millions)
Table 47. Americas Manpack Satellite Communication Terminal Sales by Type (2021-2026) & (Units)
Table 48. Americas Manpack Satellite Communication Terminal Sales by Application (2021-2026) & (Units)
Table 49. APAC Manpack Satellite Communication Terminal Sales by Region (2021-2026) & (Units)
Table 50. APAC Manpack Satellite Communication Terminal Sales Market Share by Region (2021-2026)
Table 51. APAC Manpack Satellite Communication Terminal Revenue by Region (2021-2026) & ($ millions)
Table 52. APAC Manpack Satellite Communication Terminal Sales by Type (2021-2026) & (Units)
Table 53. APAC Manpack Satellite Communication Terminal Sales by Application (2021-2026) & (Units)
Table 54. Europe Manpack Satellite Communication Terminal Sales by Country (2021-2026) & (Units)
Table 55. Europe Manpack Satellite Communication Terminal Revenue by Country (2021-2026) & ($ millions)
Table 56. Europe Manpack Satellite Communication Terminal Sales by Type (2021-2026) & (Units)
Table 57. Europe Manpack Satellite Communication Terminal Sales by Application (2021-2026) & (Units)
Table 58. Middle East & Africa Manpack Satellite Communication Terminal Sales by Country (2021-2026) & (Units)
Table 59. Middle East & Africa Manpack Satellite Communication Terminal Revenue Market Share by Country (2021-2026)
Table 60. Middle East & Africa Manpack Satellite Communication Terminal Sales by Type (2021-2026) & (Units)
Table 61. Middle East & Africa Manpack Satellite Communication Terminal Sales by Application (2021-2026) & (Units)
Table 62. Key Market Drivers & Growth Opportunities of Manpack Satellite Communication Terminal

+357 96 030922
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Table 63. Key Market Challenges & Risks of Manpack Satellite Communication Terminal
Table 64. Key Industry Trends of Manpack Satellite Communication Terminal
Table 65. Manpack Satellite Communication Terminal Raw Material
Table 66. Key Suppliers of Raw Materials
Table 67. Manpack Satellite Communication Terminal Distributors List
Table 68. Manpack Satellite Communication Terminal Customer List
Table 69. Global Manpack Satellite Communication Terminal Sales Forecast by Region (2027-2032) & (Units)
Table 70. Global Manpack Satellite Communication Terminal Revenue Forecast by Region (2027-2032) & ($ millions)
Table 71. Americas Manpack Satellite Communication Terminal Sales Forecast by Country (2027-2032) & (Units)
Table 72. Americas Manpack Satellite Communication Terminal Annual Revenue Forecast by Country (2027-2032) & ($ millions)
Table 73. APAC Manpack Satellite Communication Terminal Sales Forecast by Region (2027-2032) & (Units)
Table 74. APAC Manpack Satellite Communication Terminal Annual Revenue Forecast by Region (2027-2032) & ($ millions)
Table 75. Europe Manpack Satellite Communication Terminal Sales Forecast by Country (2027-2032) & (Units)
Table 76. Europe Manpack Satellite Communication Terminal Revenue Forecast by Country (2027-2032) & ($ millions)
Table 77. Middle East & Africa Manpack Satellite Communication Terminal Sales Forecast by Country (2027-2032) & (Units)
Table 78. Middle East & Africa Manpack Satellite Communication Terminal Revenue Forecast by Country (2027-2032) & ($ millions)
Table 79. Global Manpack Satellite Communication Terminal Sales Forecast by Type (2027-2032) & (Units)
Table 80. Global Manpack Satellite Communication Terminal Revenue Forecast by Type (2027-2032) & ($ millions)
Table 81. Global Manpack Satellite Communication Terminal Sales Forecast by Application (2027-2032) & (Units)
Table 82. Global Manpack Satellite Communication Terminal Revenue Forecast by Application (2027-2032) & ($ millions)
Table 83. Hughes Network Systems, LLC Basic Information, Manpack Satellite Communication Terminal Manufacturing Base, Sales Area and Its Competitors
Table 84. Hughes Network Systems, LLC Manpack Satellite Communication Terminal Product Portfolios and Specifications

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Table 85. Hughes Network Systems, LLC Manpack Satellite Communication Terminal Sales (Units), Revenue ($ Million), Price (US$/Unit) and Gross Margin (2021-2026)
Table 86. Hughes Network Systems, LLC Main Business
Table 87. Hughes Network Systems, LLC Latest Developments
Table 88. L3Harris Technologies, Inc. Basic Information, Manpack Satellite Communication Terminal Manufacturing Base, Sales Area and Its Competitors
Table 89. L3Harris Technologies, Inc. Manpack Satellite Communication Terminal Product Portfolios and Specifications
Table 90. L3Harris Technologies, Inc. Manpack Satellite Communication Terminal Sales (Units), Revenue ($ Million), Price (US$/Unit) and Gross Margin (2021-2026)
Table 91. L3Harris Technologies, Inc. Main Business
Table 92. L3Harris Technologies, Inc. Latest Developments
Table 93. Viasat, Inc. Basic Information, Manpack Satellite Communication Terminal Manufacturing Base, Sales Area and Its Competitors
Table 94. Viasat, Inc. Manpack Satellite Communication Terminal Product Portfolios and Specifications
Table 95. Viasat, Inc. Manpack Satellite Communication Terminal Sales (Units), Revenue ($ Million), Price (US$/Unit) and Gross Margin (2021-2026)
Table 96. Viasat, Inc. Main Business
Table 97. Viasat, Inc. Latest Developments
Table 98. Antenna Research Associates, Inc. Basic Information, Manpack Satellite Communication Terminal Manufacturing Base, Sales Area and Its Competitors
Table 99. Antenna Research Associates, Inc. Manpack Satellite Communication Terminal Product Portfolios and Specifications
Table 100. Antenna Research Associates, Inc. Manpack Satellite Communication Terminal Sales (Units), Revenue ($ Million), Price (US$/Unit) and Gross Margin (2021-2026)
Table 101. Antenna Research Associates, Inc. Main Business
Table 102. Antenna Research Associates, Inc. Latest Developments
Table 103. Vislink Technologies, Inc. Basic Information, Manpack Satellite Communication Terminal Manufacturing Base, Sales Area and Its Competitors
Table 104. Vislink Technologies, Inc. Manpack Satellite Communication Terminal Product Portfolios and Specifications
Table 105. Vislink Technologies, Inc. Manpack Satellite Communication Terminal Sales (Units), Revenue ($ Million), Price (US$/Unit) and Gross Margin (2021-2026)
Table 106. Vislink Technologies, Inc. Main Business
Table 107. Vislink Technologies, Inc. Latest Developments
Table 108. Norsat International Inc. Basic Information, Manpack Satellite Communication Terminal Manufacturing Base, Sales Area and Its Competitors

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Table 109. Norsat International Inc. Manpack Satellite Communication Terminal Product Portfolios and Specifications
Table 110. Norsat International Inc. Manpack Satellite Communication Terminal Sales (Units), Revenue ($ Million), Price (US$/Unit) and Gross Margin (2021-2026)
Table 111. Norsat International Inc. Main Business
Table 112. Norsat International Inc. Latest Developments
Table 113. Thales Basic Information, Manpack Satellite Communication Terminal Manufacturing Base, Sales Area and Its Competitors
Table 114. Thales Manpack Satellite Communication Terminal Product Portfolios and Specifications
Table 115. Thales Manpack Satellite Communication Terminal Sales (Units), Revenue ($ Million), Price (US$/Unit) and Gross Margin (2021-2026)
Table 116. Thales Main Business
Table 117. Thales Latest Developments
Table 118. Holkirk Communications Ltd Basic Information, Manpack Satellite Communication Terminal Manufacturing Base, Sales Area and Its Competitors
Table 119. Holkirk Communications Ltd Manpack Satellite Communication Terminal Product Portfolios and Specifications
Table 120. Holkirk Communications Ltd Manpack Satellite Communication Terminal Sales (Units), Revenue ($ Million), Price (US$/Unit) and Gross Margin (2021-2026)
Table 121. Holkirk Communications Ltd Main Business
Table 122. Holkirk Communications Ltd Latest Developments
Table 123. Ultra Intelligence & Communications Basic Information, Manpack Satellite Communication Terminal Manufacturing Base, Sales Area and Its Competitors
Table 124. Ultra Intelligence & Communications Manpack Satellite Communication Terminal Product Portfolios and Specifications
Table 125. Ultra Intelligence & Communications Manpack Satellite Communication Terminal Sales (Units), Revenue ($ Million), Price (US$/Unit) and Gross Margin (2021-2026)
Table 126. Ultra Intelligence & Communications Main Business
Table 127. Ultra Intelligence & Communications Latest Developments
Table 128. Paradigm Communication Systems Ltd Basic Information, Manpack Satellite Communication Terminal Manufacturing Base, Sales Area and Its Competitors
Table 129. Paradigm Communication Systems Ltd Manpack Satellite Communication Terminal Product Portfolios and Specifications
Table 130. Paradigm Communication Systems Ltd Manpack Satellite Communication Terminal Sales (Units), Revenue ($ Million), Price (US$/Unit) and Gross Margin (2021-2026)
Table 131. Paradigm Communication Systems Ltd Main Business

+357 96 030922
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Table 132. Paradigm Communication Systems Ltd Latest Developments
Table 133. Requtech AB Basic Information, Manpack Satellite Communication Terminal Manufacturing Base, Sales Area and Its Competitors
Table 134. Requtech AB Manpack Satellite Communication Terminal Product Portfolios and Specifications
Table 135. Requtech AB Manpack Satellite Communication Terminal Sales (Units), Revenue ($ Million), Price (US$/Unit) and Gross Margin (2021-2026)
Table 136. Requtech AB Main Business
Table 137. Requtech AB Latest Developments
Table 138. Satcube AB Basic Information, Manpack Satellite Communication Terminal Manufacturing Base, Sales Area and Its Competitors
Table 139. Satcube AB Manpack Satellite Communication Terminal Product Portfolios and Specifications
Table 140. Satcube AB Manpack Satellite Communication Terminal Sales (Units), Revenue ($ Million), Price (US$/Unit) and Gross Margin (2021-2026)
Table 141. Satcube AB Main Business
Table 142. Satcube AB Latest Developments
Table 143. Ovzon AB Basic Information, Manpack Satellite Communication Terminal Manufacturing Base, Sales Area and Its Competitors
Table 144. Ovzon AB Manpack Satellite Communication Terminal Product Portfolios and Specifications
Table 145. Ovzon AB Manpack Satellite Communication Terminal Sales (Units), Revenue ($ Million), Price (US$/Unit) and Gross Margin (2021-2026)
Table 146. Ovzon AB Main Business
Table 147. Ovzon AB Latest Developments
Table 148. GISS Sp. z o.o. Basic Information, Manpack Satellite Communication Terminal Manufacturing Base, Sales Area and Its Competitors
Table 149. GISS Sp. z o.o. Manpack Satellite Communication Terminal Product Portfolios and Specifications
Table 150. GISS Sp. z o.o. Manpack Satellite Communication Terminal Sales (Units), Revenue ($ Million), Price (US$/Unit) and Gross Margin (2021-2026)
Table 151. GISS Sp. z o.o. Main Business
Table 152. GISS Sp. z o.o. Latest Developments
Table 153. Indra Sistemas, S.A. Basic Information, Manpack Satellite Communication Terminal Manufacturing Base, Sales Area and Its Competitors
Table 154. Indra Sistemas, S.A. Manpack Satellite Communication Terminal Product Portfolios and Specifications
Table 155. Indra Sistemas, S.A. Manpack Satellite Communication Terminal Sales (Units), Revenue ($ Million), Price (US$/Unit) and Gross Margin (2021-2026)

+357 96 030922
info@marketpublishers.com

Table 156. Indra Sistemas, S.A. Main Business
Table 157. Indra Sistemas, S.A. Latest Developments
Table 158. INSTER Tecnolog?a y Comunicaciones, S.A.U. Basic Information, Manpack Satellite Communication Terminal Manufacturing Base, Sales Area and Its Competitors
Table 159. INSTER Tecnolog?a y Comunicaciones, S.A.U. Manpack Satellite Communication Terminal Product Portfolios and Specifications
Table 160. INSTER Tecnolog?a y Comunicaciones, S.A.U. Manpack Satellite Communication Terminal Sales (Units), Revenue ($ Million), Price (US$/Unit) and Gross Margin (2021-2026)
Table 161. INSTER Tecnolog?a y Comunicaciones, S.A.U. Main Business
Table 162. INSTER Tecnolog?a y Comunicaciones, S.A.U. Latest Developments
Table 163. Temix Communications Srl Basic Information, Manpack Satellite Communication Terminal Manufacturing Base, Sales Area and Its Competitors
Table 164. Temix Communications Srl Manpack Satellite Communication Terminal Product Portfolios and Specifications
Table 165. Temix Communications Srl Manpack Satellite Communication Terminal Sales (Units), Revenue ($ Million), Price (US$/Unit) and Gross Margin (2021-2026)
Table 166. Temix Communications Srl Main Business
Table 167. Temix Communications Srl Latest Developments
Table 168. ASELSAN A.?. Basic Information, Manpack Satellite Communication Terminal Manufacturing Base, Sales Area and Its Competitors
Table 169. ASELSAN A.?. Manpack Satellite Communication Terminal Product Portfolios and Specifications
Table 170. ASELSAN A.?. Manpack Satellite Communication Terminal Sales (Units), Revenue ($ Million), Price (US$/Unit) and Gross Margin (2021-2026)
Table 171. ASELSAN A.?. Main Business
Table 172. ASELSAN A.?. Latest Developments
Table 173. Pals Electronics A.S. Basic Information, Manpack Satellite Communication Terminal Manufacturing Base, Sales Area and Its Competitors
Table 174. Pals Electronics A.S. Manpack Satellite Communication Terminal Product Portfolios and Specifications
Table 175. Pals Electronics A.S. Manpack Satellite Communication Terminal Sales (Units), Revenue ($ Million), Price (US$/Unit) and Gross Margin (2021-2026)
Table 176. Pals Electronics A.S. Main Business
Table 177. Pals Electronics A.S. Latest Developments
Table 178. Profen Defence Technologies Basic Information, Manpack Satellite Communication Terminal Manufacturing Base, Sales Area and Its Competitors
Table 179. Profen Defence Technologies Manpack Satellite Communication Terminal Product Portfolios and Specifications

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Table 180. Profen Defence Technologies Manpack Satellite Communication Terminal Sales (Units), Revenue ($ Million), Price (US$/Unit) and Gross Margin (2021-2026)
Table 181. Profen Defence Technologies Main Business
Table 182. Profen Defence Technologies Latest Developments
Table 183. Gilat Satellite Networks Ltd. Basic Information, Manpack Satellite Communication Terminal Manufacturing Base, Sales Area and Its Competitors
Table 184. Gilat Satellite Networks Ltd. Manpack Satellite Communication Terminal Product Portfolios and Specifications
Table 185. Gilat Satellite Networks Ltd. Manpack Satellite Communication Terminal Sales (Units), Revenue ($ Million), Price (US$/Unit) and Gross Margin (2021-2026)
Table 186. Gilat Satellite Networks Ltd. Main Business
Table 187. Gilat Satellite Networks Ltd. Latest Developments
Table 188. Elbit Systems Ltd. Basic Information, Manpack Satellite Communication Terminal Manufacturing Base, Sales Area and Its Competitors
Table 189. Elbit Systems Ltd. Manpack Satellite Communication Terminal Product Portfolios and Specifications
Table 190. Elbit Systems Ltd. Manpack Satellite Communication Terminal Sales (Units), Revenue ($ Million), Price (US$/Unit) and Gross Margin (2021-2026)
Table 191. Elbit Systems Ltd. Main Business
Table 192. Elbit Systems Ltd. Latest Developments
Table 193. NST New Satellite Technologies Basic Information, Manpack Satellite Communication Terminal Manufacturing Base, Sales Area and Its Competitors
Table 194. NST New Satellite Technologies Manpack Satellite Communication Terminal Product Portfolios and Specifications
Table 195. NST New Satellite Technologies Manpack Satellite Communication Terminal Sales (Units), Revenue ($ Million), Price (US$/Unit) and Gross Margin (2021-2026)
Table 196. NST New Satellite Technologies Main Business
Table 197. NST New Satellite Technologies Latest Developments
Table 198. Bharat Electronics Limited Basic Information, Manpack Satellite Communication Terminal Manufacturing Base, Sales Area and Its Competitors
Table 199. Bharat Electronics Limited Manpack Satellite Communication Terminal Product Portfolios and Specifications
Table 200. Bharat Electronics Limited Manpack Satellite Communication Terminal Sales (Units), Revenue ($ Million), Price (US$/Unit) and Gross Margin (2021-2026)
Table 201. Bharat Electronics Limited Main Business
Table 202. Bharat Electronics Limited Latest Developments
Table 203. Hanwha Systems Co., Ltd. Basic Information, Manpack Satellite Communication Terminal Manufacturing Base, Sales Area and Its Competitors
Table 204. Hanwha Systems Co., Ltd. Manpack Satellite Communication Terminal

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Product Portfolios and Specifications
Table 205. Hanwha Systems Co., Ltd. Manpack Satellite Communication Terminal Sales (Units), Revenue ($ Million), Price (US$/Unit) and Gross Margin (2021-2026)
Table 206. Hanwha Systems Co., Ltd. Main Business
Table 207. Hanwha Systems Co., Ltd. Latest Developments
Table 208. Intellian Technologies Inc. Basic Information, Manpack Satellite Communication Terminal Manufacturing Base, Sales Area and Its Competitors
Table 209. Intellian Technologies Inc. Manpack Satellite Communication Terminal Product Portfolios and Specifications
Table 210. Intellian Technologies Inc. Manpack Satellite Communication Terminal Sales (Units), Revenue ($ Million), Price (US$/Unit) and Gross Margin (2021-2026)
Table 211. Intellian Technologies Inc. Main Business
Table 212. Intellian Technologies Inc. Latest Developments
Table 213. ST Engineering Basic Information, Manpack Satellite Communication Terminal Manufacturing Base, Sales Area and Its Competitors
Table 214. ST Engineering Manpack Satellite Communication Terminal Product Portfolios and Specifications
Table 215. ST Engineering Manpack Satellite Communication Terminal Sales (Units), Revenue ($ Million), Price (US$/Unit) and Gross Margin (2021-2026)
Table 216. ST Engineering Main Business
Table 217. ST Engineering Latest Developments
Table 218. Rapidtek Technologies Inc. Basic Information, Manpack Satellite Communication Terminal Manufacturing Base, Sales Area and Its Competitors
Table 219. Rapidtek Technologies Inc. Manpack Satellite Communication Terminal Product Portfolios and Specifications
Table 220. Rapidtek Technologies Inc. Manpack Satellite Communication Terminal Sales (Units), Revenue ($ Million), Price (US$/Unit) and Gross Margin (2021-2026)
Table 221. Rapidtek Technologies Inc. Main Business
Table 222. Rapidtek Technologies Inc. Latest Developments
Table 223. AVCON Information Technology Co.,Ltd Basic Information, Manpack Satellite Communication Terminal Manufacturing Base, Sales Area and Its Competitors
Table 224. AVCON Information Technology Co.,Ltd Manpack Satellite Communication Terminal Product Portfolios and Specifications
Table 225. AVCON Information Technology Co.,Ltd Manpack Satellite Communication Terminal Sales (Units), Revenue ($ Million), Price (US$/Unit) and Gross Margin (2021-2026)
Table 226. AVCON Information Technology Co.,Ltd Main Business
Table 227. AVCON Information Technology Co.,Ltd Latest Developments
Table 228. Shanghai Highgain Information Technology Corp.,Ltd Basic Information,

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Manpack Satellite Communication Terminal Manufacturing Base, Sales Area and Its Competitors
Table 229. Shanghai Highgain Information Technology Corp.,Ltd Manpack Satellite Communication Terminal Product Portfolios and Specifications
Table 230. Shanghai Highgain Information Technology Corp.,Ltd Manpack Satellite Communication Terminal Sales (Units), Revenue ($ Million), Price (US$/Unit) and Gross Margin (2021-2026)
Table 231. Shanghai Highgain Information Technology Corp.,Ltd Main Business
Table 232. Shanghai Highgain Information Technology Corp.,Ltd Latest Developments
Table 233. Sichuan Andi S&T Industry Co., Ltd. Basic Information, Manpack Satellite Communication Terminal Manufacturing Base, Sales Area and Its Competitors
Table 234. Sichuan Andi S&T Industry Co., Ltd. Manpack Satellite Communication Terminal Product Portfolios and Specifications
Table 235. Sichuan Andi S&T Industry Co., Ltd. Manpack Satellite Communication Terminal Sales (Units), Revenue ($ Million), Price (US$/Unit) and Gross Margin (2021-2026)
Table 236. Sichuan Andi S&T Industry Co., Ltd. Main Business
Table 237. Sichuan Andi S&T Industry Co., Ltd. Latest Developments
Table 238. Jiangsu Anruixun Xinxi Keji Youxian Gongsi Basic Information, Manpack Satellite Communication Terminal Manufacturing Base, Sales Area and Its Competitors
Table 239. Jiangsu Anruixun Xinxi Keji Youxian Gongsi Manpack Satellite Communication Terminal Product Portfolios and Specifications
Table 240. Jiangsu Anruixun Xinxi Keji Youxian Gongsi Manpack Satellite Communication Terminal Sales (Units), Revenue ($ Million), Price (US$/Unit) and Gross Margin (2021-2026)
Table 241. Jiangsu Anruixun Xinxi Keji Youxian Gongsi Main Business
Table 242. Jiangsu Anruixun Xinxi Keji Youxian Gongsi Latest Developments
Table 243. Gao Jun Beijing Technology Company Limited Basic Information, Manpack Satellite Communication Terminal Manufacturing Base, Sales Area and Its Competitors
Table 244. Gao Jun Beijing Technology Company Limited Manpack Satellite Communication Terminal Product Portfolios and Specifications
Table 245. Gao Jun Beijing Technology Company Limited Manpack Satellite Communication Terminal Sales (Units), Revenue ($ Million), Price (US$/Unit) and Gross Margin (2021-2026)
Table 246. Gao Jun Beijing Technology Company Limited Main Business
Table 247. Gao Jun Beijing Technology Company Limited Latest Developments
Table 248. Cowave Satellite Communication Technology Co., Ltd. Basic Information, Manpack Satellite Communication Terminal Manufacturing Base, Sales Area and Its Competitors

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Table 249. Cowave Satellite Communication Technology Co., Ltd. Manpack Satellite Communication Terminal Product Portfolios and Specifications
Table 250. Cowave Satellite Communication Technology Co., Ltd. Manpack Satellite Communication Terminal Sales (Units), Revenue ($ Million), Price (US$/Unit) and Gross Margin (2021-2026)
Table 251. Cowave Satellite Communication Technology Co., Ltd. Main Business
Table 252. Cowave Satellite Communication Technology Co., Ltd. Latest Developments
Table 253. Satpro M&C Tech Co., Ltd. Basic Information, Manpack Satellite Communication Terminal Manufacturing Base, Sales Area and Its Competitors
Table 254. Satpro M&C Tech Co., Ltd. Manpack Satellite Communication Terminal Product Portfolios and Specifications
Table 255. Satpro M&C Tech Co., Ltd. Manpack Satellite Communication Terminal Sales (Units), Revenue ($ Million), Price (US$/Unit) and Gross Margin (2021-2026)
Table 256. Satpro M&C Tech Co., Ltd. Main Business
Table 257. Satpro M&C Tech Co., Ltd. Latest Developments
Table 258. Nanjing Keyidea Information Technology Co., Ltd. Basic Information, Manpack Satellite Communication Terminal Manufacturing Base, Sales Area and Its Competitors
Table 259. Nanjing Keyidea Information Technology Co., Ltd. Manpack Satellite Communication Terminal Product Portfolios and Specifications
Table 260. Nanjing Keyidea Information Technology Co., Ltd. Manpack Satellite Communication Terminal Sales (Units), Revenue ($ Million), Price (US$/Unit) and Gross Margin (2021-2026)
Table 261. Nanjing Keyidea Information Technology Co., Ltd. Main Business
Table 262. Nanjing Keyidea Information Technology Co., Ltd. Latest Developments
Table 263. Zhongzong Xingtong Beijing Wangluo Jishu Youxian Gongsi Basic Information, Manpack Satellite Communication Terminal Manufacturing Base, Sales Area and Its Competitors
Table 264. Zhongzong Xingtong Beijing Wangluo Jishu Youxian Gongsi Manpack Satellite Communication Terminal Product Portfolios and Specifications
Table 265. Zhongzong Xingtong Beijing Wangluo Jishu Youxian Gongsi Manpack Satellite Communication Terminal Sales (Units), Revenue ($ Million), Price (US$/Unit) and Gross Margin (2021-2026)
Table 266. Zhongzong Xingtong Beijing Wangluo Jishu Youxian Gongsi Main Business
Table 267. Zhongzong Xingtong Beijing Wangluo Jishu Youxian Gongsi Latest Developments
Table 268. Shandong Lihang Weixing Tongxin Youxian Gongsi Basic Information, Manpack Satellite Communication Terminal Manufacturing Base, Sales Area and Its Competitors

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Table 269. Shandong Lihang Weixing Tongxin Youxian Gongsi Manpack Satellite Communication Terminal Product Portfolios and Specifications
Table 270. Shandong Lihang Weixing Tongxin Youxian Gongsi Manpack Satellite Communication Terminal Sales (Units), Revenue ($ Million), Price (US$/Unit) and Gross Margin (2021-2026)
Table 271. Shandong Lihang Weixing Tongxin Youxian Gongsi Main Business
Table 272. Shandong Lihang Weixing Tongxin Youxian Gongsi Latest Developments
Table 273. Suzhou Aqing Zhineng Keji Youxian Gongsi Basic Information, Manpack Satellite Communication Terminal Manufacturing Base, Sales Area and Its Competitors
Table 274. Suzhou Aqing Zhineng Keji Youxian Gongsi Manpack Satellite Communication Terminal Product Portfolios and Specifications
Table 275. Suzhou Aqing Zhineng Keji Youxian Gongsi Manpack Satellite Communication Terminal Sales (Units), Revenue ($ Million), Price (US$/Unit) and Gross Margin (2021-2026)
Table 276. Suzhou Aqing Zhineng Keji Youxian Gongsi Main Business
Table 277. Suzhou Aqing Zhineng Keji Youxian Gongsi Latest Developments
Table 278. Haining Lezhong Information Technology Co., Ltd. Basic Information, Manpack Satellite Communication Terminal Manufacturing Base, Sales Area and Its Competitors
Table 279. Haining Lezhong Information Technology Co., Ltd. Manpack Satellite Communication Terminal Product Portfolios and Specifications
Table 280. Haining Lezhong Information Technology Co., Ltd. Manpack Satellite Communication Terminal Sales (Units), Revenue ($ Million), Price (US$/Unit) and Gross Margin (2021-2026)
Table 281. Haining Lezhong Information Technology Co., Ltd. Main Business
Table 282. Haining Lezhong Information Technology Co., Ltd. Latest Developments
Table 283. Nanjing China-Spacenet Satellite Telecom Co., Ltd. Basic Information, Manpack Satellite Communication Terminal Manufacturing Base, Sales Area and Its Competitors
Table 284. Nanjing China-Spacenet Satellite Telecom Co., Ltd. Manpack Satellite Communication Terminal Product Portfolios and Specifications
Table 285. Nanjing China-Spacenet Satellite Telecom Co., Ltd. Manpack Satellite Communication Terminal Sales (Units), Revenue ($ Million), Price (US$/Unit) and Gross Margin (2021-2026)
Table 286. Nanjing China-Spacenet Satellite Telecom Co., Ltd. Main Business
Table 287. Nanjing China-Spacenet Satellite Telecom Co., Ltd. Latest Developments
Table 288. Beijing Tiantong Zhongxing Keji Youxian Gongsi Basic Information, Manpack Satellite Communication Terminal Manufacturing Base, Sales Area and Its Competitors

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Table 289. Beijing Tiantong Zhongxing Keji Youxian Gongsi Manpack Satellite Communication Terminal Product Portfolios and Specifications
Table 290. Beijing Tiantong Zhongxing Keji Youxian Gongsi Manpack Satellite Communication Terminal Sales (Units), Revenue ($ Million), Price (US$/Unit) and Gross Margin (2021-2026)
Table 291. Beijing Tiantong Zhongxing Keji Youxian Gongsi Main Business
Table 292. Beijing Tiantong Zhongxing Keji Youxian Gongsi Latest Developments
Table 293. Sichuan Satec Co., Ltd. Basic Information, Manpack Satellite Communication Terminal Manufacturing Base, Sales Area and Its Competitors
Table 294. Sichuan Satec Co., Ltd. Manpack Satellite Communication Terminal Product Portfolios and Specifications
Table 295. Sichuan Satec Co., Ltd. Manpack Satellite Communication Terminal Sales (Units), Revenue ($ Million), Price (US$/Unit) and Gross Margin (2021-2026)
Table 296. Sichuan Satec Co., Ltd. Main Business
Table 297. Sichuan Satec Co., Ltd. Latest Developments
Table 298. Chengdu Coresat Technology Co., Ltd. Basic Information, Manpack Satellite Communication Terminal Manufacturing Base, Sales Area and Its Competitors
Table 299. Chengdu Coresat Technology Co., Ltd. Manpack Satellite Communication Terminal Product Portfolios and Specifications
Table 300. Chengdu Coresat Technology Co., Ltd. Manpack Satellite Communication Terminal Sales (Units), Revenue ($ Million), Price (US$/Unit) and Gross Margin (2021-2026)
Table 301. Chengdu Coresat Technology Co., Ltd. Main Business
Table 302. Chengdu Coresat Technology Co., Ltd. Latest Developments

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