

SATCOM on the Move Market by Platform (Land, Airborne, Maritime), Vertical (Government & Defense, Commercial), Frequency(C Band, L,&S Band, X Band, Ka Band, Ku Band, VHF/UHF Band, EHF/SHF Band, Multi Band, Q Band), and Region - Forecast to 2026

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Abstracts

The SATCOM on the move market is projected to grow from USD 17.7 Billion in 2021 to USD 42.8 Billion by 2026, at a CAGR of 19.3%. SATCOM equipment is an integral part of the communication in commercial and defense industry. The deployment of low earth orbit (LEO) satellites and constellations of satellites for communications applications has increased their demand across the globe. Other factors driving the market growth include growing demand for Ku- and Ka-band satellites, and the growing fleet of autonomous and connected vehicles used for various applications in the military and commercial sectors, which require customized SATCOM-on-the-move antennas.

The SATCOM on the move market is dominated by a few globally established players such as Thales Group (France), L3Harris Technologies (US), Honeywell International Inc. (US), Hughes Network Systems (US), Viasat, Inc. (US), among others. These players have spread their business across various countries includes North America, Europe, Asia Pacific, Middle East & Africa, and South America. COVID-19 has affected the SATCOM on the move growth to some extent, and this varies from country to country. Industry experts believe that the pandemic has not affected the demand for SATCOM equipment in commercial, Government and defense sector.

Based on platform, airborne SATCOM segment is estimated to account for the fastest growth of the SATCOM on the move from 2021 to 2026.

Based on platform, airborne SATCOM segment is estimated to lead the SATCOM on

the move from 2021 to 2026 and is projected to grow further due to the increasing need for high-definition intelligence, surveillance, and reconnaissance (ISR) videos, and an increasing number of connected commercial aircraft, rising adoption of UAVs and rising number of private aviation companies worldwide supporting market growth. In December 2019, The French Airforce have enhanced their Airborne Satellite communication capabilities by adopting new Thales technologies. The French Defense agency awarded a contract to Thales to design and built the next-generation Syracuse 4 satellite communication system. This contract enables French defense forces to improvise the SATCOM system in the Charles De Gaulle Aircraft Carrier and the Rafale combat aircraft.

Based on verticals, commercial segment is estimated to account for the fastest growth of the SATCOM on the move market from 2021 to 2026.

Based on verticals, commercial segment is expected to lead the SATCOM on the move market from 2021 to 2026. This is due to increasing need for uninterrupted mobile broadband coverage in remote and far-flung regions, streaming information and entertainment, extensive use of small satellites for commercialization and data transferability, technological advancements in transport and logistics network, and increasing demand for broadband connections and VSAT connectivity. In July 2021, the Digital Communications Commission (DCC) accepted the sector regulator's call to allow VSAT operators to provide satellite-based cellular backhaul connectivity to telcos to ensure uninterrupted mobile broadband coverage in remote and far-flung regions.

The North American market is projected to contribute the largest share from 2021 to 2026 in the SATCOM equipment market

Based on region, North America is expected to lead the SATCOM on the move market from 2021 to 2026. The US is a lucrative market for SATCOM equipment in the North American region. The US government is increasingly investing in the field of SATCOM to enhance the quality and effectiveness of satellite communication. The increasing investment on SATCOM equipment to enhance defense and surveillance capabilities of the armed forces, modernization of existing communication in military platforms, critical infrastructure and law enforcement agencies are increasingly using SATCOM equipment are key factors expected to drive the SATCOM on the move market in North America. In August 2020, The US Special Operations Command (USSOCOM) awarded Cubic Mission Solutions (CMS) a follow-on, single-award, indefinite-delivery/indefinite-quantity (ID/IQ) contract with a ceiling of USD 172 million. The contract is for the delivery of Ground Area Transmit Receive (GATR) inflatable SATCOM terminals and

baseband communications equipment in support of the communications requirements of Special Operations Forces (SOF).

Prominent players from this region include L3Harris Technologies (US), Honeywell International Inc. (US), Hughes Network Systems (US), Viasat, Inc. (US) and others.

The break-up of the profile of primary participants in the SATCOM equipment market:

By Company Type: Tier 1 – 35%, Tier 2 – 45%, and Tier 3 – 20%

By Designation: C Level – 35%, Director Level – 25%, and Others – 40%

By Region: North America – 40%, Europe – 30%, Asia Pacific – 20%, Middle East & Africa – 5%, South America – 5%

Major companies profiled in the report include Thales Group (France), L3Harris Technologies (US), Honeywell International Inc. (US), Hughes Network Systems (US), Viasat, Inc. (US), among others.

Research Coverage:

This market study covers the SATCOM on the move across various segments and subsegments. It aims at estimating the size and growth potential of this market across different segments based on solutions, verticals, technology, connectivity, frequency, platform, and region. This study also includes an in-depth competitive analysis of the key players in the market, along with their company profiles, key observations related to their product and business offerings, recent developments undertaken by them, and key market strategies adopted by them.

Reasons to buy this report:

The report will help the market leaders/new entrants in this market with information on the closest approximations of the revenue numbers for the overall SATCOM on the move market. This report will help stakeholders understand the competitive landscape and gain more insights to position their businesses better and to plan suitable go-to-market strategies. The report also helps stakeholders understand the pulse of the market and provides them with information on key market drivers, restraints, challenges, and opportunities.

The report provides insights on the following pointers:

Market Penetration: Comprehensive information on SATCOM equipment offered by the top players in the market

Product Development/Innovation: Detailed insights on upcoming technologies, research & development activities, and new product launches in the SATCOM equipment market

Market Development: Comprehensive information about lucrative markets – the report analyses the SATCOM equipment market across varied regions

Market Diversification: Exhaustive information about new products, untapped geographies, recent developments, and investments in the SATCOM equipment market

Competitive Assessment: In-depth assessment of market shares, growth strategies, products, and manufacturing capabilities of leading players in the SATCOM equipment market

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