

# **Space-Based Network Market - Global Industry Size, Share, Trends, Opportunity, and Forecast, Segmented, By Application (Agriculture, Maritime, Aviation, Enterprise, Data & Telecommunication, Logistics & Transportation, and Others), By End User (Defense & Government, Commercial, and Individual Users), By Component (Satellite, Gateways, & Antenna Dish And Modem), By Orbit (Low Earth Orbit, Medium Earth Orbit, and Geostationary Earth Orbit), By Region & Competition, 2021-2031F**

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## **Abstracts**

The Global Space-Based Network Market is projected to expand from USD 10.19 Billion in 2025 to USD 31.87 Billion by 2031, registering a CAGR of 20.93%. This market consists of satellite constellations, primarily in Low Earth Orbit (LEO) and Medium Earth Orbit (MEO), which deliver universal internet and telecommunications connectivity without relying on terrestrial infrastructure. Growth is largely driven by the rising need for dependable broadband in aviation, maritime, and remote sectors where ground-based networks are too costly, as well as the strategic integration of satellite systems with 5G architecture to ensure global coverage and robust emergency communications.

Despite this expansion, the industry faces significant hurdles regarding spectrum allocation disputes and regulatory compliance, which can delay deployment. In 2024, GSMA Intelligence reported that 91 telecommunications operators partnered with satellite vendors to extend their networks, potentially reaching 5 billion subscribers. While these collaborations demonstrate the sector's vast scale, the complexity of

managing international frequency rights remains a major obstacle to achieving seamless global operations.

## **Market Driver**

The rapid proliferation of Low Earth Orbit (LEO) mega-constellations is transforming the market by enabling high-capacity, low-latency services through the creation of dense mesh networks. Operators are prioritizing the deployment of thousands of satellites to secure market share, with the Space Foundation reporting in January 2025 that the total mass of spacecraft deployed increased by 40% in 2024 to 1.9 million kilograms, largely due to heavier next-generation broadband satellites. This growth is supported by commercial dominance, as Payload Space noted in 2025 that commercially operated rockets accounted for 70% of all global launch attempts in 2024, facilitating swift network expansion.

Rising global demand for ubiquitous high-speed broadband serves as the primary economic engine, especially in sectors like maritime, aviation, and remote regions where terrestrial connectivity is scarce. This need translates into substantial revenue for LEO operators; for instance, Eutelsat Group reported in August 2025 that their LEO-based revenues jumped by 84.1% year-on-year to \$187 million. These figures underscore the robust commercial adoption of satellite services in markets that have traditionally been underserved.

## **Market Challenge**

Spectrum allocation disputes and regulatory compliance issues act as the primary barriers to the growth of the Global Space-Based Network Market. As operators launch massive constellations, the finite radio frequency spectrum creates a bottleneck that restricts industrial expansion. Companies must navigate a disjointed regulatory environment where securing landing rights varies by jurisdiction, often leading to lengthy negotiations to prevent interference; this lack of harmonization significantly delays commercial service rollouts and reduces the return on investment for capital-intensive projects.

These administrative challenges are worsened by the physical congestion of orbital shells, which overwhelms coordination bodies attempting to assign clear frequency rights. The inability to quickly resolve spectrum conflicts creates uncertainty that deters new market entrants. The Satellite Industry Association reported in 2024 that active commercial satellites in orbit exceeded 9,000, a density that has drastically increased

the volume of coordination requests. Consequently, this regulatory gridlock slows the deployment of the critical infrastructure needed to bridge the global connectivity gap.

## **Market Trends**

The mainstream commercialization of Direct-to-Device (D2D) satellite connectivity is fundamentally shifting the market by moving satellite services from niche emergency applications to mass-market consumer offerings. This trend integrates non-terrestrial networks directly with standard smartphones, allowing operators to monetize ubiquitous coverage without requiring specialized hardware. A December 2025 report by Viasat indicates that over 60% of consumers globally are willing to pay extra for satellite-enabled services on their phones, confirming the significant economic potential of hybrid terrestrial-satellite subscriptions.

Simultaneously, the adoption of Optical Inter-Satellite Links (OISL) for high-speed mesh networking is reducing reliance on ground infrastructure by enabling secure, ultra-low latency data routing in space. By establishing laser-based links between satellites, operators can transmit data at light speed, bypassing terrestrial bottlenecks and geopolitical restrictions associated with landing rights. This architecture is gaining commercial traction; in April 2025, Rivada Space Networks announced it had secured service agreements worth over \$16 billion for its laser-linked Outernet constellation, demonstrating the high demand for secure, optical space-based data transport.

## **Key Market Players**

Space Exploration Technologies Corp.

OneWeb Ltd.

SES S.A.

Iridium Communications Inc.

Telesat Canada

Amazon.com, Inc.

LeoSat Enterprises, LLC

Eutelsat Communications S.A.

Thales Alenia Space

Hughes Network Systems, LLC

## Report Scope

In this report, the Global Space-Based Network Market has been segmented into the following categories, in addition to the industry trends which have also been detailed below:

### Space-Based Network Market, By Application

Agriculture

Maritime

Aviation

Enterprise

Data & Telecommunication

Logistics & Transportation

Others

### Space-Based Network Market, By End User

Defense & Government

Commercial

Individual Users

### Space-Based Network Market, By Component

Satellite

Gateways

& Antenna Dish Modem

Space-Based Network Market, By Orbit

Low Earth Orbit

Medium Earth Orbit

Geostationary Earth Orbit

Space-Based Network Market, By Region

North America

United States

Canada

Mexico

Europe

France

United Kingdom

Italy

Germany

Spain

Asia Pacific

China

India

Japan

Australia

South Korea

South America

Brazil

Argentina

Colombia

Middle East & Africa

South Africa

Saudi Arabia

UAE

## **Competitive Landscape**

Company Profiles: Detailed analysis of the major companies present in the Global Space-Based Network Market.

## **Available Customizations:**

Global Space-Based Network Market report with the given market data, TechSci Research offers customizations according to a company's specific needs. The following customization options are available for the report:

## **Company Information**

Detailed analysis and profiling of additional market players (up to five).

## Contents

### **1. PRODUCT OVERVIEW**

- 1.1. Market Definition
- 1.2. Scope of the Market
  - 1.2.1. Markets Covered
  - 1.2.2. Years Considered for Study
  - 1.2.3. Key Market Segmentations

### **2. RESEARCH METHODOLOGY**

- 2.1. Objective of the Study
- 2.2. Baseline Methodology
- 2.3. Key Industry Partners
- 2.4. Major Association and Secondary Sources
- 2.5. Forecasting Methodology
- 2.6. Data Triangulation & Validation
- 2.7. Assumptions and Limitations

### **3. EXECUTIVE SUMMARY**

- 3.1. Overview of the Market
- 3.2. Overview of Key Market Segmentations
- 3.3. Overview of Key Market Players
- 3.4. Overview of Key Regions/Countries
- 3.5. Overview of Market Drivers, Challenges, Trends

### **4. VOICE OF CUSTOMER**

### **5. GLOBAL SPACE-BASED NETWORK MARKET OUTLOOK**

- 5.1. Market Size & Forecast
  - 5.1.1. By Value
- 5.2. Market Share & Forecast
  - 5.2.1. By Application (Agriculture, Maritime, Aviation, Enterprise, Data & Telecommunication, Logistics & Transportation, Others)
  - 5.2.2. By End User (Defense & Government, Commercial, Individual Users)
  - 5.2.3. By Component (Satellite, Gateways, & Antenna Dish Modem)

- 5.2.4. By Orbit (Low Earth Orbit, Medium Earth Orbit, Geostationary Earth Orbit)
- 5.2.5. By Region
- 5.2.6. By Company (2025)
- 5.3. Market Map

## **6. NORTH AMERICA SPACE-BASED NETWORK MARKET OUTLOOK**

- 6.1. Market Size & Forecast
  - 6.1.1. By Value
- 6.2. Market Share & Forecast
  - 6.2.1. By Application
  - 6.2.2. By End User
  - 6.2.3. By Component
  - 6.2.4. By Orbit
  - 6.2.5. By Country
- 6.3. North America: Country Analysis
  - 6.3.1. United States Space-Based Network Market Outlook
    - 6.3.1.1. Market Size & Forecast
      - 6.3.1.1.1. By Value
    - 6.3.1.2. Market Share & Forecast
      - 6.3.1.2.1. By Application
      - 6.3.1.2.2. By End User
      - 6.3.1.2.3. By Component
      - 6.3.1.2.4. By Orbit
  - 6.3.2. Canada Space-Based Network Market Outlook
    - 6.3.2.1. Market Size & Forecast
      - 6.3.2.1.1. By Value
    - 6.3.2.2. Market Share & Forecast
      - 6.3.2.2.1. By Application
      - 6.3.2.2.2. By End User
      - 6.3.2.2.3. By Component
      - 6.3.2.2.4. By Orbit
  - 6.3.3. Mexico Space-Based Network Market Outlook
    - 6.3.3.1. Market Size & Forecast
      - 6.3.3.1.1. By Value
    - 6.3.3.2. Market Share & Forecast
      - 6.3.3.2.1. By Application
      - 6.3.3.2.2. By End User
      - 6.3.3.2.3. By Component

#### 6.3.3.2.4. By Orbit

## 7. EUROPE SPACE-BASED NETWORK MARKET OUTLOOK

### 7.1. Market Size & Forecast

#### 7.1.1. By Value

### 7.2. Market Share & Forecast

#### 7.2.1. By Application

#### 7.2.2. By End User

#### 7.2.3. By Component

#### 7.2.4. By Orbit

#### 7.2.5. By Country

### 7.3. Europe: Country Analysis

#### 7.3.1. Germany Space-Based Network Market Outlook

##### 7.3.1.1. Market Size & Forecast

###### 7.3.1.1.1. By Value

##### 7.3.1.2. Market Share & Forecast

###### 7.3.1.2.1. By Application

###### 7.3.1.2.2. By End User

###### 7.3.1.2.3. By Component

###### 7.3.1.2.4. By Orbit

#### 7.3.2. France Space-Based Network Market Outlook

##### 7.3.2.1. Market Size & Forecast

###### 7.3.2.1.1. By Value

##### 7.3.2.2. Market Share & Forecast

###### 7.3.2.2.1. By Application

###### 7.3.2.2.2. By End User

###### 7.3.2.2.3. By Component

###### 7.3.2.2.4. By Orbit

#### 7.3.3. United Kingdom Space-Based Network Market Outlook

##### 7.3.3.1. Market Size & Forecast

###### 7.3.3.1.1. By Value

##### 7.3.3.2. Market Share & Forecast

###### 7.3.3.2.1. By Application

###### 7.3.3.2.2. By End User

###### 7.3.3.2.3. By Component

###### 7.3.3.2.4. By Orbit

#### 7.3.4. Italy Space-Based Network Market Outlook

##### 7.3.4.1. Market Size & Forecast

- 7.3.4.1.1. By Value
- 7.3.4.2. Market Share & Forecast
  - 7.3.4.2.1. By Application
  - 7.3.4.2.2. By End User
  - 7.3.4.2.3. By Component
  - 7.3.4.2.4. By Orbit
- 7.3.5. Spain Space-Based Network Market Outlook
  - 7.3.5.1. Market Size & Forecast
    - 7.3.5.1.1. By Value
  - 7.3.5.2. Market Share & Forecast
    - 7.3.5.2.1. By Application
    - 7.3.5.2.2. By End User
    - 7.3.5.2.3. By Component
    - 7.3.5.2.4. By Orbit

## **8. ASIA PACIFIC SPACE-BASED NETWORK MARKET OUTLOOK**

- 8.1. Market Size & Forecast
  - 8.1.1. By Value
- 8.2. Market Share & Forecast
  - 8.2.1. By Application
  - 8.2.2. By End User
  - 8.2.3. By Component
  - 8.2.4. By Orbit
  - 8.2.5. By Country
- 8.3. Asia Pacific: Country Analysis
  - 8.3.1. China Space-Based Network Market Outlook
    - 8.3.1.1. Market Size & Forecast
      - 8.3.1.1.1. By Value
    - 8.3.1.2. Market Share & Forecast
      - 8.3.1.2.1. By Application
      - 8.3.1.2.2. By End User
      - 8.3.1.2.3. By Component
      - 8.3.1.2.4. By Orbit
  - 8.3.2. India Space-Based Network Market Outlook
    - 8.3.2.1. Market Size & Forecast
      - 8.3.2.1.1. By Value
    - 8.3.2.2. Market Share & Forecast
      - 8.3.2.2.1. By Application

- 8.3.2.2.2. By End User
- 8.3.2.2.3. By Component
- 8.3.2.2.4. By Orbit
- 8.3.3. Japan Space-Based Network Market Outlook
  - 8.3.3.1. Market Size & Forecast
    - 8.3.3.1.1. By Value
  - 8.3.3.2. Market Share & Forecast
    - 8.3.3.2.1. By Application
    - 8.3.3.2.2. By End User
    - 8.3.3.2.3. By Component
    - 8.3.3.2.4. By Orbit
- 8.3.4. South Korea Space-Based Network Market Outlook
  - 8.3.4.1. Market Size & Forecast
    - 8.3.4.1.1. By Value
  - 8.3.4.2. Market Share & Forecast
    - 8.3.4.2.1. By Application
    - 8.3.4.2.2. By End User
    - 8.3.4.2.3. By Component
    - 8.3.4.2.4. By Orbit
- 8.3.5. Australia Space-Based Network Market Outlook
  - 8.3.5.1. Market Size & Forecast
    - 8.3.5.1.1. By Value
  - 8.3.5.2. Market Share & Forecast
    - 8.3.5.2.1. By Application
    - 8.3.5.2.2. By End User
    - 8.3.5.2.3. By Component
    - 8.3.5.2.4. By Orbit

## **9. MIDDLE EAST & AFRICA SPACE-BASED NETWORK MARKET OUTLOOK**

- 9.1. Market Size & Forecast
  - 9.1.1. By Value
- 9.2. Market Share & Forecast
  - 9.2.1. By Application
  - 9.2.2. By End User
  - 9.2.3. By Component
  - 9.2.4. By Orbit
  - 9.2.5. By Country
- 9.3. Middle East & Africa: Country Analysis

### 9.3.1. Saudi Arabia Space-Based Network Market Outlook

#### 9.3.1.1. Market Size & Forecast

##### 9.3.1.1.1. By Value

#### 9.3.1.2. Market Share & Forecast

##### 9.3.1.2.1. By Application

##### 9.3.1.2.2. By End User

##### 9.3.1.2.3. By Component

##### 9.3.1.2.4. By Orbit

### 9.3.2. UAE Space-Based Network Market Outlook

#### 9.3.2.1. Market Size & Forecast

##### 9.3.2.1.1. By Value

#### 9.3.2.2. Market Share & Forecast

##### 9.3.2.2.1. By Application

##### 9.3.2.2.2. By End User

##### 9.3.2.2.3. By Component

##### 9.3.2.2.4. By Orbit

### 9.3.3. South Africa Space-Based Network Market Outlook

#### 9.3.3.1. Market Size & Forecast

##### 9.3.3.1.1. By Value

#### 9.3.3.2. Market Share & Forecast

##### 9.3.3.2.1. By Application

##### 9.3.3.2.2. By End User

##### 9.3.3.2.3. By Component

##### 9.3.3.2.4. By Orbit

## 10. SOUTH AMERICA SPACE-BASED NETWORK MARKET OUTLOOK

### 10.1. Market Size & Forecast

#### 10.1.1. By Value

### 10.2. Market Share & Forecast

#### 10.2.1. By Application

#### 10.2.2. By End User

#### 10.2.3. By Component

#### 10.2.4. By Orbit

#### 10.2.5. By Country

### 10.3. South America: Country Analysis

#### 10.3.1. Brazil Space-Based Network Market Outlook

##### 10.3.1.1. Market Size & Forecast

##### 10.3.1.1.1. By Value

#### 10.3.1.2. Market Share & Forecast

10.3.1.2.1. By Application

10.3.1.2.2. By End User

10.3.1.2.3. By Component

10.3.1.2.4. By Orbit

#### 10.3.2. Colombia Space-Based Network Market Outlook

10.3.2.1. Market Size & Forecast

10.3.2.1.1. By Value

10.3.2.2. Market Share & Forecast

10.3.2.2.1. By Application

10.3.2.2.2. By End User

10.3.2.2.3. By Component

10.3.2.2.4. By Orbit

#### 10.3.3. Argentina Space-Based Network Market Outlook

10.3.3.1. Market Size & Forecast

10.3.3.1.1. By Value

10.3.3.2. Market Share & Forecast

10.3.3.2.1. By Application

10.3.3.2.2. By End User

10.3.3.2.3. By Component

10.3.3.2.4. By Orbit

## 11. MARKET DYNAMICS

11.1. Drivers

11.2. Challenges

## 12. MARKET TRENDS & DEVELOPMENTS

12.1. Merger & Acquisition (If Any)

12.2. Product Launches (If Any)

12.3. Recent Developments

## 13. GLOBAL SPACE-BASED NETWORK MARKET: SWOT ANALYSIS

## 14. PORTER'S FIVE FORCES ANALYSIS

14.1. Competition in the Industry

14.2. Potential of New Entrants

- 14.3. Power of Suppliers
- 14.4. Power of Customers
- 14.5. Threat of Substitute Products

## **15. COMPETITIVE LANDSCAPE**

- 15.1. Space Exploration Technologies Corp.
  - 15.1.1. Business Overview
  - 15.1.2. Products & Services
  - 15.1.3. Recent Developments
  - 15.1.4. Key Personnel
  - 15.1.5. SWOT Analysis
- 15.2. OneWeb Ltd.
- 15.3. SES S.A.
- 15.4. Iridium Communications Inc.
- 15.5. Telesat Canada
- 15.6. Amazon.com, Inc.
- 15.7. LeoSat Enterprises, LLC
- 15.8. Eutelsat Communications S.A.
- 15.9. Thales Alenia Space
- 15.10. Hughes Network Systems, LLC

## **16. STRATEGIC RECOMMENDATIONS**

## **17. ABOUT US & DISCLAIMER**

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