

Europe VSAT (Very Small Aperture Terminal) Market Size and Forecast (2021 - 2031)

<https://marketpublishers.com/r/EF71316EC97CEN.html>

Date: April 2026

Pages: 166

Price: US\$ 3,450.00 (Single User License)

ID: EF71316EC97CEN

Abstracts

The Europe VSAT (Very Small Aperture Terminal) market is projected to grow significantly, reaching an estimated US\$ 5,368.7 million by 2031, up from US\$ 2,004.4 million in 2024. This growth represents a compound annual growth rate (CAGR) of 15.1% from 2025 to 2031, indicating a robust demand for VSAT technology across the continent.

Executive Summary and Market Analysis

The European VSAT market is characterized by a dynamic interplay of technological advancements, regulatory frameworks, and diverse demand across various countries. Leading nations such as the UK, Germany, France, and the Nordic countries are at the forefront of VSAT adoption, thanks to their advanced telecommunications infrastructure and strong public-private partnerships. The European Space Agency (ESA) plays a crucial role in promoting satellite innovation, particularly in developing advanced VSAT systems for applications like environmental monitoring, navigation, and secure communications.

A significant driver of the VSAT market in Europe is the urgent need to address the digital divide in rural and mountainous regions, especially in Southern and Eastern Europe, where traditional terrestrial networks are often insufficient. Additionally, the maritime and aviation sectors are major consumers of VSAT technology, driven by Europe's extensive transport networks and regulatory requirements for reliable onboard connectivity.

The humanitarian and defense sectors also leverage VSAT technology to support operations in areas affected by geopolitical instability or natural disasters. A notable

trend in the region is the emphasis on sustainability and energy efficiency, prompting VSAT providers to adopt greener satellite technologies and operational practices. While the European Union has established harmonized spectrum regulations, variations in national implementations can create challenges for market players.

The competitive landscape of the VSAT market is shaped by both established satellite operators and emerging technology startups, fostering a vibrant environment for innovation and service diversification. Recent advancements in software-defined satellites and the integration of cloud-based infrastructure are enhancing the flexibility and scalability of VSAT services. In 2024, the European Commission awarded contracts to SES, Eutelsat, and Hispasat to develop the EU's secure satellite infrastructure, IRIS², which aims to bolster resilient VSAT-driven communication for public services. Furthermore, initiatives to launch sovereign satellite constellations in Europe signal strong growth potential for the market.

Strategic Insights

Market Segmentation Analysis

The Europe VSAT market can be segmented by component, platform, and application:

By Component: The market is divided into Services and Equipment, with the Services segment leading in 2024.

By Platform: The market is categorized into Land VSAT, Maritime VSAT, and Airborne VSAT, where Land VSAT held the largest share in 2024.

By Application: The market is segmented into Broadband or Data Networks, Private Network Services, Voice Communications, Broadcast, and Others, with Broadband or Data Networks dominating in 2024.

Market Outlook

Globally, the VSAT market is set for continued growth, driven by the increasing integration of high-frequency Ku and Ka-band technologies. In December 2023, Viasat partnered with Airbus to integrate its multiband airborne Ku and Ka-band terminal (GAT5530) on the Irish Air Corps' C295 MSA aircraft, enhancing SATCOM capabilities for military surveillance and transport missions. This partnership exemplifies the

advancements in Ku and Ka-band VSAT technologies that are enhancing defense mobility worldwide.

In 2025, corporate innovation further strengthened the Ku and Ka-band market. Viasat announced a strategic agreement with Telesat to incorporate Telesat Lightspeed LEO Ka-band capacity into its multiorbit services roadmap, thereby improving connectivity services across aviation, maritime, and defense sectors. Concurrently, SES completed its acquisition of Intelsat and launched its "Open Orbits Inflight Connectivity Network," which combines GEO and MEO Ka-band infrastructure with regional partners, facilitating seamless inflight connectivity for airlines.

These developments—from NSIL's Ka-band HTS rollouts to Viasat's airborne platforms and SES's multiorbital Ka-band networks—illustrate how the rising adoption of high-frequency bands is unlocking growth in sectors such as inflight connectivity, defense mobility, and rural broadband.

Country Insights

The Europe VSAT market is also analyzed by country, with Germany, France, Italy, the United Kingdom, Russia, and the Rest of Europe being key players. Germany held the largest market share in 2024, driven by enterprise adoption in sectors such as industrial, energy, and mobility. The country benefits from a robust multiorbit infrastructure, including GEO, MEO, and LEO networks, which enhances capacity and resilience for businesses and maritime operators.

Notable satellite providers like SES and Intelsat have merged capacities, while O3b mPOWER MEO systems and Ka-band Jupiter 3 GEO services have improved coverage for remote enterprise needs. Additionally, trials of 5G non-terrestrial networks (NTN) with OneWeb LEO systems suggest future integration with consumer-grade broadband. Germany's focus on cybersecurity and regulatory compliance is also shaping the VSAT landscape, with systems tailored to meet EU data governance standards. The German government's new Space Strategy through 2030 emphasizes satellite communications as part of a broader digital infrastructure, promoting NewSpace commercialization and public-private collaboration.

Company Profiles

Key players in the Europe VSAT market include Echostar Corp, Talia Communications Ltd, Afrikanet Oxford Consultech UK Ltd, Norsat International Inc, VSATmena FZCO,

Sandstream Telecoms, GlobalTT SaRL, Vizocom ICT LLC, NTvsat, and Link Communications Systems Ltd. These companies are pursuing various strategies such as expansion, product innovation, and mergers and acquisitions to enhance their market presence and offer innovative solutions to consumers.

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