

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

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Abstracts

The North America VSAT (Very Small Aperture Terminal) Market is projected to grow significantly, reaching an estimated US\$ 7,798.3 million by 2031, up from US\$ 3,173.1 million in 2024. This growth represents a compound annual growth rate (CAGR) of 13.7% from 2025 to 2031.

Executive Summary and Market Analysis

The VSAT market in North America is distinguished by its advanced technology and extensive satellite infrastructure, catering to a robust demand from both commercial and government sectors. The United States and Canada are at the forefront of satellite communication technology, establishing the region as a leader in VSAT innovation. The increasing need for high-speed internet connectivity in remote and underserved areas, such as Alaska, northern Canada, and rural regions of the US, is a significant driver for VSAT deployments. Additionally, the US military and government agencies are major users of VSAT networks, relying on them for secure and mobile communications in challenging environments. In 2023, the General Services Administration (GSA) renewed a five-year contract with Satcom Global, ensuring the continued provision of satellite airtime and hardware to US government agencies, which underscores the importance of VSAT in federal operations.

Commercial sectors, including oil and gas, maritime, aviation, and disaster recovery, also contribute to the growing demand for VSAT services. The emergence of Low Earth Orbit (LEO) satellite constellations and advancements in Ka-band technology have enhanced the capabilities of VSAT systems, resulting in faster and more reliable connections. However, the market faces challenges such as regulatory hurdles, spectrum allocation issues, and competition from fiber-optic networks and 5G

technology. Despite these challenges, innovations in software-defined networking (SDN), satellite miniaturization, and adaptive bandwidth management are enabling providers to deliver more efficient and cost-effective VSAT solutions. The presence of major industry players and government investments in broadband connectivity initiatives further bolster the growth potential of the region. For instance, in 2025, L3Harris Technologies secured a significant contract with the US Army to provide the Hawkeye III Lite VSAT terminal system, enhancing mobile, high-speed satellite communications for military applications. Furthermore, partnerships between private space companies and telecom providers are paving the way for the next generation of satellite broadband services, with VSAT systems playing a crucial role in hybrid connectivity models. As digital transformation accelerates across various sectors, North America remains a pivotal region in shaping the global VSAT landscape.

Strategic Insights

Market Segmentation Analysis

The North America VSAT market is segmented by various criteria:

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

By Platform: The market includes Land VSAT, Maritime VSAT, and Airborne VSAT, with Land VSAT dominating in 2024.

By Application: The segments include Broadband or Data Networks, Private Network Services, Voice Communications, Broadcast, and Others, with Broadband or Data Networks being the largest segment in 2024.

Market Outlook

The VSAT market is strategically positioned for substantial growth, driven by a global surge in demand for high-throughput satellite (HTS) services. Between 2023 and 2025, several government and industry initiatives have enhanced the reliability and sophistication of VSAT-enabled HTS infrastructure. For example, Viasat's ViaSat3 F1 satellite began providing secure, high-throughput services for the U.S. Department of Defense and allied government users in October 2024. This network is designed to dynamically allocate bandwidth and provide encrypted, anti-jam connectivity, which is

essential for mission-critical applications.

In June 2024, General Dynamics Mission Systems collaborated with Telesat to co-develop VSAT terminals optimized for Telesat's upcoming LEO satellite constellation, highlighting the demand for high-speed, resilient terminals among enterprise and government users. Additionally, ST Engineering Direct introduced an innovative algorithm in December 2024 that allows VSAT terminals to switch seamlessly between GEO and non-GEO satellites, enhancing network flexibility and resilience. Overall, the increasing demand for HTS data services, driven by government broadband initiatives, defense modernization, and the rise of multiorbit satellite constellations, is acting as a catalyst for the VSAT market. As HTS capacity becomes more accessible and system architectures more agile, VSAT is emerging as a critical enabler of secure, high-bandwidth connectivity across various sectors.

Country Insights

The North America VSAT market is segmented by country into the United States, Canada, and Mexico, with the United States holding the largest market share in 2024. The US VSAT market is one of the most established globally, driven by strong demand from government, defense, enterprise, energy, and telecommunications sectors. VSAT systems are crucial for providing connectivity in rural and remote areas, serving as a reliable alternative where terrestrial infrastructure is lacking. The rise of telecommuting and remote operations has further accelerated demand. Key factors influencing growth include government investments in satellite communication infrastructure for disaster resilience and national security, as well as the increasing adoption of Internet of Things (IoT) solutions that require reliable connectivity. Technological advancements, such as high-throughput satellites (HTS), LEO deployments, and hybrid satellite-terrestrial systems, have improved the appeal of VSAT by enhancing bandwidth, reliability, and latency, catering to diverse enterprise and government needs. In 2025, the federal Broadband Equity, Access, and Deployment (BEAD) program, initially allocated US\$42.5 billion for fiber broadband in rural areas, is expected to shift focus towards satellite internet providers, including Starlink, marking a significant turn towards VSAT-enabled connectivity.

Company Profiles

Key players in the North America 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 employing 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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