

KSA Satellite Communications - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts (2026 - 2031)

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Report description:

KSA Satellite Communications Market Analysis

The KSA Satellite Communications Market was valued at USD 1.46 billion in 2025 and estimated to grow from USD 1.57 billion in 2026 to reach USD 2.23 billion by 2031, at a CAGR of 7.35% during the forecast period (2026-2031).

Rising public-sector capital outlays, streamlined spectrum awards, and Vision 2030's mandate to extend next-generation connectivity into every industry underpin this expansion. Substantial funding from the Public Investment Fund (PIF) has already positioned Neo Space Group as the national champion, while cross-border demand from aviation, maritime and energy operators accelerates uptake of multi-orbit capacity. Market participants view managed services as a pragmatic way to avoid upfront equipment costs; at the same time, Ku- and Ka-band high-throughput satellites (HTS) guarantee the bandwidth density required for 5G backhaul and IoT analytics. Consolidation-exemplified by SES's purchase of Intelsat-adds pricing power but also raises the bar for cybersecurity, orchestration and service-level guarantees.

KSA Satellite Communications Market Trends and Insights

Government Investment Under Vision 2030 and KSA Space Strategy

The USD 500 billion Vision 2030 program allocates sustained capital to space assets, including PIF's USD 270 million domestic satellite-manufacturing line and Neo Space Group's multi-orbit roadmap. Complementing expenditure, the Communications,

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Space & Technology Commission (CST) has opened multiyear spectrum blocks for Ka- and Ku-band and introduced the USD 28 million SpaceUp Competition to spur downstream analytics. These policies de-risk commercial deployments, grow a local supply chain and embed sustainability standards in procurement specifications.

Digital-First Shift in Oil and Maritime IoT Backhaul

Saudi Aramco's memorandum with SES to deploy MEO connectivity for 5G backhaul exemplifies the transition from legacy VSAT to hybrid GEO-MEO-LEO models. Low-latency links now enable real-time pipeline diagnostics and autonomous drilling, while Red Sea shipping operators adopt satellite-enabled vessel tracking to meet just-in-time logistics targets. Edge computing nodes positioned at offshore rigs exploit satellite redundancy when fiber links are unviable, driving recurring bandwidth purchases from regional fleet operators.

Regulatory and Spectrum-Allocation Delays

CST's integration of space oversight has lengthened approval queues, especially for LEO filings that require ITU coordination. Foreign-ownership limits of 60% mean overseas operators must form joint ventures, extending deal cycles. Dual compliance with CST and SASO adds 6-12 months to equipment roll-outs, prompting some enterprises to defer projects.

Other drivers and restraints analyzed in the detailed report include:

Increased Demand for Ubiquitous Broadband Connectivity
Planned Saudi Sovereign LEO Constellation (Neo Space Group)
Competition from Fiber and 5G Terrestrial Roll-Outs

For complete list of drivers and restraints, kindly check the Table Of Contents.

Segment Analysis

VSAT systems retained 37.92% of KSA satellite communication market share in 2025, reflecting entrenched deployments in defense networks and oilfield SCADA sites. The KSA satellite communication market size for VSAT still grows, yet LEO constellations outpace at 12% CAGR as Starlink and Neo Space Group gain aviation and maritime licenses. Notably, SES-Intelsat's merger unlocks bundled GEO-MEO-LEO contracts that compress total cost of ownership for enterprises seeking latency-sensitive connectivity.

Multi-orbit orchestration software allows service providers to route traffic dynamically, exploiting GEO for broadcast, MEO for mid-latency data and LEO for burst capacity. This capability dovetails with CST's cybersecurity guidance mandating end-to-end encryption and link diversity, thereby steering contracts toward operators offering integrated architectures.

Ku-band preserved 34.28% share of KSA satellite communication market size in 2025, benefiting from field-proven terminals and largescale anchor tenants. However, Ka-band's 11.35% CAGR mirrors demand for HTS beams to backhaul 5G and enterprise SD-WAN applications. Arabsat's planned Badr-9 flexible payload will add steerable Ka-band capacity across Saudi Arabia, while CST's latest allocation round earmarked additional 2 GHz for Ka backhaul.

Technical hurdles-rain fade, tighter pointing-are countered by auto-tracking antennas and adaptive coding, trimming link budgets. Meanwhile, C-band relinquishes terrestrial mobile spectrum, pushing broadcasters toward Ku and Ka. Experimental Q/V-band gateways at KAUST hint at the Kingdom's long-term spectrum roadmap.

The KSA Satellite Communication Market Report is Segmented by Technology Type (VSAT, High-Throughput Satellites, and More),

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Frequency Band (L-Band, C-Band, Ku-Band, and More), Solution (Ground Equipment, Managed Services), Platform (Portable/Man-pack, Land, Maritime, Airborne), End-User Vertical (Maritime, Defense and Government, and More, and Geography). The Market Forecasts are Provided in Terms of Value (USD).

List of Companies Covered in this Report:

Arab Satellite Communications Organization (ARABSAT) Saudi Telecom Company (stc) Neo Space Group Salam (Integrated Telecom Company) Thuraya Telecommunications Company Inmarsat Global Limited Eutelsat Group AXESS Networks Arabia Saudita (Hispasat) Detecon Al-Saudia Co. Ltd. (DETASAD) NOVA sat SES S.A. Intelsat SpaceX Starlink (KSA) OneWeb Telesat Sahara Net HiCap Telecommunications Company Mawarid Electronics Limited First Gulf Company (FGC) Skyband Saudi Net Link ICCSAT Baud Telecom Company Networks Nova Stars Information Services

Additional Benefits:

The market estimate (ME) sheet in Excel format
3 months of analyst support

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