

Software-Defined Satellite Market to Reach USD \$5.86 Billion by 2029 at 13.6% CAGR

*The Business Research Company's
Software-Defined Satellite Global Market
Report 2025 – Market Size, Trends, And
Global Forecast 2025-2034*

LONDON, GREATER LONDON, UNITED
KINGDOM, October 7, 2025

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What Is The Estimated Industry Size Of Software-Defined Satellite Market?

The [market size for software-defined satellites](#) has seen a substantial uptick in recent times. The

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market size, which will be at \$3.09 billion in 2024, is predicted to rise to \$3.52 billion in 2025, marking a compound annual growth rate (CAGR) of 14.0%. Several factors have contributed to this growth in the historic period, including a rising demand for robust bandwidth, increased usage of satellite communications within the defense sector, the broadening of telecom networks, the surging number of small satellites, and boosted government expenditure on space programs.

Accelerated expansion is anticipated in the software-

defined satellite market in the upcoming years, with projections indicating a swell to \$5.86 billion by 2029, bolstered by a compound annual growth rate (CAGR) of 13.6%. This predicted development over the forecasted duration can be credited to the escalating demand for nimble satellite networks, the surge in the use of cloud-based satellite facilities, the requirement for flexible spectrum management, advancement in earth observation applications, and an uptick in the call for low-latency communication. The forecasted period will also witness significant trends including advancements in technology of software-defined payloads, innovative breakthroughs in reconfigurable satellite systems, ongoing research and development in on-board processing, the evolution of autonomous satellite functions, and technological progression in software-defined payloads.

Download a free sample of the software-defined satellite market report:

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What Are The Major Factors Driving The Software-Defined Satellite Global Market Growth?

The growth of the software-defined satellite market is anticipated to be fueled by the expansion of telecommunication networks. These networks are interconnected systems that facilitate the transmission of voice, data, and video between individuals and devices across varying distances. The development of these networks is largely attributed to the introduction of 5G technology, which provides quicker data speeds, lower latency, and allows for an extensive number of connected devices. Software-defined satellites boost telecommunication networks by providing adaptable payloads, this makes them perfect for meeting the ever-changing demands for bandwidth and coverage. These satellites increase network efficiency by permitting dynamic service modifications, enhancing connectivity, and operational flexibility. For example, by the close of the fourth quarter of 2024, the number of fixed broadband lines had risen to 29.2 million, which was a year-on-year increase of 691,000 (2.4%), as indicated by the UK-based Office of Communications (Ofcom) in April 2025. As a result, the growth of the software-defined satellite market is being propelled by the expansion of telecommunication networks.

Who Are The Leading Companies In The Software-Defined Satellite Market?

Major players in the Software-Defined Satellite Global Market Report 2025 include:

- The Boeing Company
- Lockheed Martin Corporation
- Airbus S.A.S.
- General Dynamics Mission Systems Inc.
- Northrop Grumman Corporation
- Thales S.A.
- L3Harris Technologies Inc.
- SES S.A.
- Hughes Network Systems LLC
- Eutelsat Communications S.A.

What Are The Key Trends And Market Opportunities In The Software-Defined Satellite Sector?

In an effort to boost technological prowess and widen their spectrum of services, major players in the software-defined satellite industry are focusing on strategic collaborations. These partnerships involve companies pooling their skills, expertise, and resources to promote innovation, cut costs, and broaden their market opportunities. An example of this trend happened in May 2022, when Arab Satellite Communications Organization, based in Saudi Arabia, joined hands with Thales Alenia Space, a French aerospace enterprise. Their joint venture was to launch Arabsat-7A, a fully flexible software-defined satellite (SDS) that leverages Thales' Space Inspire platform. The launch of this satellite will empower in-orbit reconfiguration to promptly adapt services observing the broadband demand and enhance video broadcasting. Primarily replacing the existing capacity of the aging Arabsat 5A, Arabsat-7A will also add high-

throughput Ku-band capacity to extend services across the Middle East, Africa, and parts of Europe. It demonstrates Arabsat's agenda to adopt flexible, agile satellite technology to effectively serve its clientele and contribute to the region's economic development.

What Are The Primary [Segments Covered In The Global Software-Defined Satellite](#) Market Report?

The software-defined satellite market covered in this report is segmented

- 1) By Component: Hardware, Software, Services
- 2) By Orbit Type: Low Earth Orbit (LEO), Medium Earth Orbit (MEO), Geostationary Orbit (GEO)
- 3) By Technology: Software-Defined Radio, Artificial Intelligence (AI), Cloud Computation, Reconfigurable Payload
- 4) By Application: Communication, Earth Observation, Navigation, Scientific Research, Other Applications
- 5) By End-User: Commercial, Government, Defense, Other End-Users

Subsegments:

- 1) By Hardware: Antennas, Transponders, Power Amplifiers, Receivers, Onboard Processors
- 2) By Software: Network Management Software, Signal Processing Software, Payload Management Software, Ground Control Software, Data Analytics Software
- 3) By Services: Integration And Deployment Services, Consulting Services, Maintenance And Support Services, Managed Services, Training And Education Services

View the full software-defined satellite market report:

<https://www.thebusinessresearchcompany.com/report/software-defined-satellite-global-market-report>

Which Region Is Forecasted To Grow The Fastest In The Software-Defined Satellite Industry?

In 2024, North America led the global market for software-defined satellites and is projected to continue growing. The Software-Defined Satellite Global Market Report 2025 broadens its scope to include regions such as Asia-Pacific - anticipated to have the quickest growth, Western Europe, Eastern Europe, South America, the Middle East, and Africa.

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