Airborne SATCOM Market Forecast to 2028 - COVID-19 Impact and Global Analysis By Platform (Commercial Aircraft, Military Aircraft, Helicopters, and UAV), Component (SATCOM Terminals, Transceivers, Airborne Radio, Modems and Routers, SATCOM Radomes, and Others), and Application (Defense and Commercial)

Market Report | 2022-07-12 | 177 pages | The Insight Partners

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Report description:

The airborne SATCOM market size is expected to grow from US$ 6,492.75 million in 2022 to US$ 10,390.96 million by 2028; it is estimated to grow at a CAGR of 8.2% from 2022 to 2028.

Communications on the move (COTM) is one of the most important applications of satellite communication technology. The COTM assists first responders in the military and commercial sectors, and it also finds major role in disaster recovery, emergency preparedness, remote access, and so on. Moreover, communications in moving aircraft such as commercial and government unmanned aerial vehicles (UAVs) equipped with a satellite are referred to as COTM; these UAVs are capable of establishing and sustaining communications with a satellite network while the aircraft is in motion. The satellite-based COTM (SATCOM) has emerged as a new trend in defense and commercial aerial communication systems with the continuously growing effectiveness of COTM technologies. The consistent developments in this communication technology are attributed to the introduction of high-powered L-band satellites with low-gain antenna solutions, designed originally for the security and defense industries. In November 2018, Get SAT announced the release of the UltraBlade L-Band antenna for on-the-go L-band airborne applications. Both, commercial and military customers and operators want faster speeds and more competitive bandwidth pricing. Operators' networks are being constricted as different platforms require new antenna types or ways to purchase connectivity, leading to the development of advanced airborne on-the-move SATCOM solutions. the United States Naval Air Systems (NAVAIR), in March 2020, selected Hughes Network Systems, LLC (HUGHES), a global leader in broadband satellite networks and services, to procure SATCOM systems for the HC-27J aircraft of the US Coast Guard. Hughes incorporated Beyond Line of Sight (BLoS) systems into these aircraft, which require airborne COTM for such as intelligence, surveillance, and reconnaissance (ISR); humanitarian aid; and

disaster relief applications. This is contributing to the rise in global airborne SATCOM market share over the years.

Europe held the second-largest share in the airborne SATCOM market in 2021. Aircraft manufacturers present in this region concentrate on the development of newer generation aircraft models with the continuous enforcement of new safety regulations and emission norms. These stringent compliances demand the integration of sophisticated subsystems and advanced technologies in aircraft. A few significant aircraft manufacturers-such as Airbus S.E., Dassault Aviation, Leonardo, and Thales Group-are headquartered in European countries, which is one of the key factors contributing to the rise in airborne SATCOM market share in Europe. The aviation industry is one of the most significant sectors contributing to the overall GDP of Europe, with air travel being the most preferred means of travel in European countries. According to GAMA, in 2020, the European general aviation fleet accessed over 4,000 airports and 133,000 aircraft. The presence of such robust aviation industry fuels the airborne SATCOM market growth in the region.

COVID-19 Pandemic Impact on Airborne SATCOM Market
Asia Pacific was hit hard by the COVID-19 pandemic, with Asian countries experiencing a drop in the GDP, international trade, and economy. The Asia Pacific military industry also took a hit during the first half of 2020, leading to a massive decline in the revenue of key market players operating in the airborne SATCOM market. The outbreak resulted in a decrease in production, military operations, and disruptions of supply chains across the region. Many emerging economies had to cut their defense budget and redirect the funding to cater to the demand across the healthcare sector. This further led to the reduction in military expenditure. Most Asia Pacific countries witnessed key airborne SATCOM market players losing significant revenue. For instance, the Indian defense enterprise lost approximately US$ 3 billion in revenues between March and May 2020. It impacted large as well as small and medium enterprises operating in the Indian aerospace and defense sectors. Further, in June 2020, the COVID-19 pandemic made the wait for the nation's first-ever VVIP planes slightly longer. Boeing asked Air India for an extra two months to rehabilitate two of the airline's B 777-300 ER aircraft for the President, Vice President, and Prime Minister. These factors have negatively impacted the APAC airborne SATCOM market growth.

Canada is expected to grow with the highest CAGR over the forecast period in the North American airborne SATCOM market owing to its increasing military expenditure wherein the country has experienced a rise of 16% in its military expenditure in 2021 compared to 2020. Further, in January 2020 WestJet secured an agreement with FLYHT Aerospace Solutions Ltd. US$6.2 million to install FLYHT's Automated Flight Information Reporting System (AFIRS). In accordance with the five-year contract, FLYHT will give WestJet AFIRS units that support satellite communications (SATCOM), as well as SATCOM air traffic control (ATC) data safety services, FANS datalink (which enables pilots and ATC to directly communicate using digital text transmissions), and voice capabilities. On every Boeing 737 in its fleet, WestJet will employ AFIRS. As a result, WestJet will equip AFIRS on more than 160 aircraft. Additionally, the country is also experiencing a rise in demand for commercial aircraft over the years which is further expected to drive the airborne SATCOM market in Canada

A few global airborne SATCOM market players profiled in this market study include Airbus SE; Thales Group; General Dynamics Mission Systems, Inc.; Honeywell International Inc.; and L3Harris Technologies, Inc.

The overall airborne SATCOM market size has been derived using both primary and secondary sources. To begin the research process, exhaustive secondary research has been conducted using internal and external sources to obtain qualitative and quantitative information related to the airborne SATCOM market. The process also serves the purpose of obtaining an overview and forecast of the airborne SATCOM market size with respect to all market segments. Also, multiple primary interviews have been conducted with industry participants to validate the data and gain more analytical insights. The participants typically involved in this process include VPs, business development managers, market intelligence managers, national sales managers, and external consultants-such as valuation experts, research analysts, and key opinion leaders-specializing in the airborne SATCOM market.

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