Aerospace and Defense Telemetry Market - Growth, Trends, Covid-19 Impact, and Forecasts (2023 - 2028)

Market Report | 2023-01-23 | 90 pages | Mordor Intelligence

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Report description:

The aerospace and defense telemetry market is expected to register a CAGR of over 4.5% during the forecast period.

The COVID-19 pandemic slightly affected the aerospace and defense telemetry market due to disruptions in supply chains in 2020. The market stabilized by the end of 2020 and has started growing since the beginning of 2021.

Increasing telemetry use in military applications, like intercepted telemetry in guided missiles, land systems, armored vehicles, aircraft, marine ships, and UAVs, is expected to augment the demand for telemetry during the forecast period.

Additionally, factors like an increase in defense spending due to various security threats imposed both externally and internally, increasing terrorist threats, several border security issues, and volatile relations among nations are expected to support the growth of the market studied. Nations are also investing in telemetry analysis data software and telemetry products. Artificial intelligence has become one of the emerging technologies for that. In October, the United States Space Force awarded a contract worth USD 3,75,000 with USD 1 million additional options to an Alburquerque-based data science startup, RS21, to research the use of for predicting satellite failures.

Aerospace & Defense Telemetry Market Trends

Satellite Segment Projected to Grow at a High Pace

Satellite telemetry is crucial for commercial and military flight test missions. These systems help monitor the data collected from onboard instrumentation over an RF link. Real-time data and its analysis is crucial for the test pilots' safety and requires a reliable

high throughput link. In November 2022, a weather satellite, Joint Polar Satellite System (JPSS-2), owned by the US National Oceanic and Atmospheric Administration, was launched from the West coast. Satellite communication is expected to increase significantly due to the increasing use of smart weapons and unmanned aerial vehicles.

Also, the launch of satellites inside a single rocket by ISRO (India) in October 2022 is expected to boost the satellite telemetry market's growth during the forecast period. The satellites belong to a UK-based OneWeb satellite communications company, and this is the first commercial mission taken up by ISRO. Various countries, like Iran, have also started exploring the market. In August 2022, Iran launched its first Khayyam satellite, a remote-sensing satellite, and has also received its first telemetry data from the satellite.

Such instances are anticipated to supplement the growth of the satellite segment during the forecast period.

Asia-Pacific and Middle East Expected to Witness the Highest Growth

Currently, North America dominates the aerospace and defense telemetry market, primarily due to high investment in the military and space sectors. However, the growth of Asia-Pacific and Middle East is expected to be higher during the forecast period. Political tensions between gulf countries have forced them to increase their defense spending for equipment modernization. Saudi Arabia, Israel, the United Arab Emirates, and Qatar are revamping their commercial and military aviation sectors. Demand for unmanned aerial vehicles is also high in the region. Such developments are likely to generate demand for telemetry systems in the region.

Emerging economies in Asia-Pacific, like India, China, and Japan, are investing in modernizing their armed forces. The modernization programs are boosted by the increased defense spending from these countries, which collectively impacts the market's growth. Major countries in the region, such as China and India, have been launching satellites for telemetry analysis. In July 2022, China launched a data relay satellite, Tianlian II-03, from the Xichang Satellite Launch Center. It is a second-generation geosynchronous orbit data relay satellite that provides data relay, telemetry, tracking, and command, services for crewed spacecraft and low and middle-orbit resource satellites. With new private aerospace startups in the region, the market for telemetry in the Asia-Pacific region is expected to grow during the forecast period. For instance, a Hyderabad-based first private Indian aerospace company Skyroot Aerospace signed up with ISRO and launched its first satellite in November 2022.

Aerospace & Defense Telemetry Market Competitor Analysis

The aerospace and defense telemetry market is fragmented, with the top five manufacturers occupying more than 50% of the market share in 2021. The application of telemetry is vast, and its use in the field of navigation, communication, military intelligence, rocketry, space science, and flight testing is propelling its demand in the global market. As the players compete to receive contracts, the level of competition is intense. BAE Systems plc, L3Harris Technologies, Inc., Lockheed Martin Corporation, and Cobham PLC are the major players in the market. Companies have been working together to develop new technologies and products in the market. In November 2022, Inmarsat Government partnered with a US-based launch and space systems company, Rocket Lab USA, Inc. for developing and manufacturing an L band radio in support of NASA's Communications Services Project (CSP). In this Rocket Lab will enable Inmarsat's InCommand, a real-time, near-Eath telemetry, command, and control service for satellites in low earth orbit (LEO). Companies are also working on new technologies to improve the telemetry market. For instance, in May 2022, Curtiss-Wright Defense Solutions unveiled its new miniature telemetry Unit, Miniature Network-Tactical Time-Space Position Information (MiTSPI) nTTU-260. It can be used for flight tests, ballistic missile tests, and hypersonic missile test programmes. This unit is said to support real-time telemetry via Ethernet and/or Chapter 4 PCM (clock and Data). Collaborations and developments such as mentioned before are expected to result in growth of the market during the forecast period.

Additional Benefits:

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

Table of Contents:

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