

Marine Onboard Communication and Control Systems Market by Type (Communication Systems, Control Systems), Platform (Commercial, Defense), End User (OEM, Aftermarket) and Region (North America, Europe, APAC, MEA, RoW) - Global Forecast to 2028

Market Report | 2023-12-18 | 222 pages | MarketsandMarkets

AVAILABLE LICENSES:

- Single User \$4950.00
- Multi User \$6650.00
- Corporate License \$8150.00
- Enterprise Site License \$10000.00

Report description:

The Marine Onboard Communication and Control Systems market is valued at USD 8.6 billion in 2023 and is projected to reach USD 12.3 billion by 2028, at a CAGR of 7.3% from 2023 to 2028. Over the last few years, the Marine Onboard Communication and Control Systems industry has continued to evolve with expanding use cases, better cost efficiencies, and a more significant impact of new technological developments in the maritime industry. The Marine Onboard Communication and Control Systems market is experiencing growth driven by increasing seaborne trade and an increase in marine fleet size. Increased demand for connectivity and automation in maritime vessels for enhanced safety, efficiency, and better user experience is driving the marine onboard communication and control systems market.

"Based on type, the Communication Systems segment is estimated to have the largest market share in 2023."

The Communication Systems segment in the Marine Onboard Communication and Control Systems market is being driven by due to rising maritime traffic and the need for efficient communication at sea. The rise in need for marine onboard communication systems is driven due to enhanced safety, navigation, and operational efficiency. Integration of advanced technologies, such as satellite communication and IoT, accelerates growth in marine onboard communication systems.

"Based on platform, the Commercial is estimated to have the largest market share in 2023."

The Commercial segment within the Marine Onboard Communication and Control Systems market is being driven by a rise in seaborne trade. The Commercial segment involves the deployment of advanced control and communication technologies on commercial ships and boats to enhance safety, navigation, and operational efficiency. The commercial segment includes

Scotts International. EU Vat number: PL 6772247784

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

passenger vessels, cargo vessels, and other ships.

"Based on End User, the OEM is estimated to have the largest market share in 2023."

The End User segment in the marine onboard communication and control systems market is being driven by the OEM segment. Original equipment manufacturers (OEMs) for the marine control and communication systems design, manufacture, and supply the original hardware and software components used in marine vessels. These OEMs play a crucial role in providing the essential systems that contribute to the safe and efficient operation of maritime assets. The OEMs offer high-quality standards for their products through rigorous testing, quality control measures, and adherence to industry standards, which results in the growth of OEMs.

"Based on regions, the Asia Pacific region is estimated to have the largest market share in 2023."

The Asia Pacific region is witnessing robust growth in the Marine Onboard Communication and Control Systems market, driven by the presence of various shipbuilding companies. The region's thriving economies are generated by the increasing seaborne trade. Governments in the region are making substantial investments in advanced technological-based marine navigation and communication systems for enhanced safety and operational efficiency. Additionally, the presence of a rapidly expanding commercial marine sector, particularly in countries like India, Japan, and China, is intensifying competition and driving innovation, contributing to market expansion.

The break-up of the profile of primary participants in the Marine Onboard Communication and Control Systems market:

-□By Company Type: Tier 1 - 35%, Tier 2 - 45%, and Tier 3 - 20%

-□By Designation: C Level - 40%, Director Level - 25%, and Others - 35%

-□By Region: North America - 40%, Europe - 25%, Asia Pacific - 20%, Middle East - 10% Rest of the World (RoW) - 5%

Major companies profiled in the report include Emerson Electric Co. (US), Wartsila (Finland), Kongsberg (Norway), ABB (Switzerland), and Northrop Grumman Corporation (US), among others.

Research Coverage:

This market study covers the Marine Onboard Communication and Control Systems market across various segments and subsegments. It aims to estimate this market's size and growth potential across different parts based on type, platform, end user, and region. This study also includes an in-depth competitive analysis of the key players in the market, their company profiles, key observations related to their product and business offerings, recent developments, and key market strategies they adopted.

Reasons to buy this report:

The report will help the market leaders/new entrants with information on the closest approximations of the revenue numbers for the overall Marine Onboard Communication and Control Systems market. This report will help stakeholders understand the competitive landscape and gain more insights to position their businesses better and plan suitable go-to-market strategies. The report also helps stakeholders understand the market pulse and provides information on key market drivers, restraints, challenges, and opportunities. The Marine Onboard Communication and Control Systems market is experiencing substantial growth, primarily driven by the increasing seaborne trade and increase in marine fleet size. The increasing trend toward international cooperation and joint operations among nations is fostering demand for Marine Onboard Communication and Control Systems, contributing to regional and global stability. The report provides insights on the following pointers:

-□Market Drivers: Market Drivers such as rise in maritime fleet size, Growing need for advanced engine control systems to enhance fuel efficiency, and other drivers covered in the report.

Scotts International. EU Vat number: PL 6772247784

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

-□Market Penetration: Comprehensive information on Marine Onboard Communication and Control Systems offered by the top players in the market

-□Product Development/Innovation: Detailed insights on upcoming technologies, research & development activities, and new product launches in the Marine Onboard Communication and Control Systems market

-□Market Development: Comprehensive information about lucrative markets - the report analyses the Marine Onboard Communication and Control Systems market across varied regions.

-□Market Diversification: Exhaustive information about new products, untapped geographies, recent developments, and investments in the Marine Onboard Communication and Control Systems market

-□Competitive Assessment: In-depth assessment of market shares, growth strategies, products, and manufacturing capabilities of leading players in the Marine Onboard Communication and Control Systems market

Table of Contents:

1	INTRODUCTION	26
1.1	STUDY OBJECTIVES	26
1.2	MARKET DEFINITION	27
1.3	STUDY SCOPE	27
FIGURE 1	MARINE ONBOARD COMMUNICATION AND CONTROL SYSTEMS MARKET SEGMENTATION	27
1.3.1	REGIONAL SCOPE	28
1.3.2	YEARS CONSIDERED	28
1.4	INCLUSIONS AND EXCLUSIONS	29
TABLE 1	INCLUSIONS AND EXCLUSIONS IN MARINE ONBOARD COMMUNICATION AND CONTROL SYSTEMS MARKET	29
1.5	CURRENCY CONSIDERED	29
TABLE 2	USD EXCHANGE RATES	29
1.6	STAKEHOLDERS	29
2	RESEARCH METHODOLOGY	30
2.1	RESEARCH DATA	30
FIGURE 2	RESEARCH PROCESS FLOW	30
FIGURE 3	RESEARCH DESIGN	31
2.1.1	SECONDARY DATA	31
2.1.1.1	Key data from secondary sources	32
2.1.2	PRIMARY DATA	32
2.1.2.1	Primary sources	32
2.1.2.2	Key data from primary sources	33
FIGURE 4	BREAKDOWN OF PRIMARY INTERVIEWS	33
2.2	FACTOR ANALYSIS	34
2.2.1	INTRODUCTION	34
2.2.2	DEMAND-SIDE INDICATORS	34
2.2.3	SUPPLY-SIDE INDICATORS	34
2.2.4	RECESSION IMPACT ANALYSIS	35
2.3	MARKET SIZE ESTIMATION	35
2.3.1	BOTTOM-UP APPROACH	35
2.3.1.1	Market size estimation and methodology	36
FIGURE 5	BOTTOM-UP APPROACH	36

Scotts International. EU Vat number: PL 6772247784

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

2.3.2	TOP-DOWN APPROACH	36
FIGURE 6	TOP-DOWN APPROACH	36
2.4	DATA TRIANGULATION	37
FIGURE 7	DATA TRIANGULATION	37
2.5	RESEARCH ASSUMPTIONS	38
2.6	RISK ANALYSIS	38
2.7	RESEARCH LIMITATIONS	39
3	EXECUTIVE SUMMARY	40
FIGURE 8	COMMUNICATION SYSTEMS SEGMENT TO LEAD MARKET FROM 2023 TO 2028	40
FIGURE 9	COMMERCIAL SEGMENT TO DOMINATE MARKET FROM 2023 TO 2028	41
FIGURE 10	OEM SEGMENT TO LEAD MARKET DURING FORECAST PERIOD	41
FIGURE 11	ONBOARD SATELLITE COMMUNICATION SYSTEMS SEGMENT TO DOMINATE MARKET FROM 2023 TO 2028	42
FIGURE 12	CARGO VESSELS SEGMENT TO ACCOUNT FOR LARGEST MARKET SIZE IN 2023	42
FIGURE 13	ASIA PACIFIC TO REGISTER HIGHEST CAGR DURING FORECAST PERIOD	43
4	PREMIUM INSIGHTS	44
4.1	ATTRACTIVE GROWTH OPPORTUNITIES FOR PLAYERS IN MARINE ONBOARD COMMUNICATION AND CONTROL SYSTEMS MARKET	44
FIGURE 14	INCREASING DEMAND FOR ADVANCED ONBOARD COMMUNICATION AND CONTROL SYSTEMS TO DRIVE MARKET	44
4.2	MARINE ONBOARD COMMUNICATION AND CONTROL SYSTEMS MARKET, BY TYPE	44
FIGURE 15	COMMUNICATION SYSTEMS SEGMENT TO HAVE LARGER MARKET SHARE THAN CONTROL SYSTEMS SEGMENT FROM 2023 TO 2028	44
4.3	MARINE ONBOARD COMMUNICATION AND CONTROL SYSTEMS MARKET FOR COMMUNICATION SYSTEMS, BY TYPE	45
FIGURE 16	ONBOARD SATELLITE COMMUNICATION SYSTEMS SEGMENT TO DOMINATE MARKET IN 2023	45
4.4	MARINE ONBOARD COMMUNICATION AND CONTROL SYSTEMS MARKET, BY PLATFORM	45
FIGURE 17	COMMERCIAL SEGMENT TO HOLD LARGER MARKET SHARE THAN DEFENSE SEGMENT FROM 2023 TO 2028	45
4.5	MARINE ONBOARD COMMUNICATION AND CONTROL SYSTEMS MARKET, BY END USER	46
FIGURE 18	OEM SEGMENT TO LEAD MARKET DURING FORECAST PERIOD	46
5	MARKET OVERVIEW	47
5.1	INTRODUCTION	47
5.2	MARKET DYNAMICS	47
FIGURE 19	MARINE ONBOARD COMMUNICATION AND CONTROL SYSTEMS MARKET: DRIVERS, RESTRAINTS, OPPORTUNITIES, AND CHALLENGES	47
5.2.1	DRIVERS	48
5.2.1.1	Rise in maritime fleet size	48
FIGURE 20	MARINE VESSEL FLEET SIZE, BY TYPE, 2020-2023	48
5.2.1.2	Growth in demand for advanced engine control systems to enhance fuel efficiency	48
5.2.1.3	Digitization in maritime industry	49
5.2.2	RESTRAINTS	49
5.2.2.1	High cost of marine onboard communication and control systems	49
5.2.2.2	Cybersecurity concerns	49
5.2.3	OPPORTUNITIES	49
5.2.3.1	Evolving connectivity solutions in maritime industry	49
5.2.3.2	Rising development of integrated systems for efficient shipborne communication and control	50
5.2.4	CHALLENGES	50
5.2.4.1	Retrofitting of marine onboard communication and control systems	50
5.2.4.2	Limited bandwidth in remote areas	50
5.3	VALUE CHAIN ANALYSIS	51

Scotts International. EU Vat number: PL 6772247784

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

FIGURE 21	MARINE ONBOARD COMMUNICATION AND CONTROL SYSTEMS MARKET: VALUE CHAIN ANALYSIS	51
5.3.1	RESEARCH & DEVELOPMENT	51
5.3.2	RAW MATERIALS	51
5.3.3	COMPONENT/PRODUCT MANUFACTURERS (OEMS)	51
5.3.4	INTEGRATORS & SYSTEM PROVIDERS	52
5.3.5	END USERS	52
5.4	TRENDS AND DISRUPTIONS IMPACTING CUSTOMER BUSINESS	52
5.4.1	REVENUE SHIFT FOR MARINE ONBOARD COMMUNICATION AND CONTROL SYSTEMS MARKET	52
FIGURE 22	MARINE ONBOARD COMMUNICATION AND CONTROL SYSTEMS MARKET: REVENUE SHIFT CURVE	52
5.5	MARKET ECOSYSTEM	53
5.5.1	PROMINENT COMPANIES	53
5.5.2	PRIVATE AND SMALL ENTERPRISES	53
5.5.3	END USERS	53
FIGURE 23	MARINE ONBOARD COMMUNICATION AND CONTROL SYSTEMS MARKET ECOSYSTEM MAP	53
FIGURE 24	MARINE ONBOARD COMMUNICATION AND CONTROL SYSTEMS MARKET ECOSYSTEM	54
TABLE 3	MARINE ONBOARD COMMUNICATION AND CONTROL SYSTEMS MARKET ECOSYSTEM	54
5.6	PORTER'S FIVE FORCES ANALYSIS	55
TABLE 4	MARINE ONBOARD COMMUNICATION AND CONTROL SYSTEMS: PORTER'S FIVE FORCES ANALYSIS	56
5.6.1	THREAT OF NEW ENTRANTS	56
5.6.2	THREAT OF SUBSTITUTES	56
5.6.3	BARGAINING POWER OF SUPPLIERS	56
5.6.4	BARGAINING POWER OF BUYERS	56
5.6.5	INTENSITY OF COMPETITIVE RIVALRY	57
5.7	AVERAGE SELLING PRICE TREND ANALYSIS	57
5.7.1	AVERAGE SELLING PRICE, BY TYPE	57
FIGURE 25	MARINE ONBOARD COMMUNICATION AND CONTROL SYSTEMS MARKET: AVERAGE SELLING PRICE TREND ANALYSIS, BY TYPE (COMMERCIAL)	57
TABLE 5	AVERAGE SELLING PRICE TREND (COMMERCIAL): MARINE ONBOARD COMMUNICATION AND CONTROL SYSTEMS MARKET, BY TYPE (USD MILLION)	57
FIGURE 26	MARINE ONBOARD COMMUNICATION AND CONTROL SYSTEMS MARKET: AVERAGE SELLING PRICE TREND ANALYSIS, BY TYPE (DEFENSE)	58
TABLE 6	AVERAGE SELLING PRICE TREND (DEFENSE): MARINE ONBOARD COMMUNICATION AND CONTROL SYSTEMS MARKET, BY TYPE (USD MILLION)	58
5.7.2	INDICATIVE PRICING ANALYSIS, BY SHIP	58
5.8	OPERATIONAL DATA	59
TABLE 7	NEW SHIP DELIVERIES, BY DEFENSE PLATFORM, 2019-2022	59
TABLE 8	NEW SHIP DELIVERIES, BY COMMERCIAL PLATFORM, 2019-2022	59
5.9	TARIFF AND REGULATORY LANDSCAPE	60
5.9.1	NORTH AMERICA: LIST OF REGULATORY BODIES, GOVERNMENT AGENCIES, AND OTHER ORGANIZATIONS	60
5.9.2	EUROPE: LIST OF REGULATORY BODIES, GOVERNMENT AGENCIES, AND OTHER ORGANIZATIONS	60
5.9.3	ASIA PACIFIC: LIST OF REGULATORY BODIES, GOVERNMENT AGENCIES, AND OTHER ORGANIZATIONS	61
5.9.4	MIDDLE EAST: LIST OF REGULATORY BODIES, GOVERNMENT AGENCIES, AND OTHER ORGANIZATIONS	61
5.9.5	REST OF THE WORLD: LIST OF REGULATORY BODIES, GOVERNMENT AGENCIES, AND OTHER ORGANIZATIONS	61
5.10	TRADE ANALYSIS	62
FIGURE 27	MARINE ONBOARD COMMUNICATION AND CONTROL SYSTEMS MARKET: IMPORT DATA FOR TOP 10 COUNTRIES	62
TABLE 9	MARINE ONBOARD COMMUNICATION AND CONTROL SYSTEMS MARKET: COUNTRY-WISE IMPORTS, 2019-2022 (USD THOUSANDS)	62

Scotts International. EU Vat number: PL 6772247784

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

FIGURE 28 □ MARINE ONBOARD COMMUNICATION AND CONTROL SYSTEMS MARKET: EXPORT DATA FOR TOP 10 COUNTRIES □ 63

TABLE 10 □ MARINE ONBOARD COMMUNICATION AND CONTROL SYSTEMS MARKET: COUNTRY-WISE EXPORTS, 2019-2022 (USD THOUSANDS) □ 63

5.11 □ KEY STAKEHOLDERS AND BUYING CRITERIA □ 64

5.11.1 □ KEY STAKEHOLDERS IN BUYING PROCESS □ 64

FIGURE 29 □ INFLUENCE OF STAKEHOLDERS ON BUYING PROCESS FOR MARINE ONBOARD COMMUNICATION AND CONTROL SYSTEMS, BY PLATFORM □ 64

TABLE 11 □ INFLUENCE OF STAKEHOLDERS ON BUYING PROCESS FOR MARINE ONBOARD COMMUNICATION AND CONTROL SYSTEMS, BY PLATFORM (%) □ 64

5.11.2 □ BUYING CRITERIA □ 65

FIGURE 30 □ KEY BUYING CRITERIA FOR MARINE ONBOARD COMMUNICATION AND CONTROL SYSTEMS, BY END USER □ 65

TABLE 12 □ KEY BUYING CRITERIA FOR MARINE ONBOARD COMMUNICATION AND CONTROL SYSTEMS, BY END USER □ 65

5.12 □ KEY CONFERENCES AND EVENTS, 2023-2024 □ 66

TABLE 13 □ MARINE ONBOARD COMMUNICATION AND CONTROL SYSTEMS MARKET: LIST OF CONFERENCES AND EVENTS □ 66

5.13 □ TECHNOLOGY ANALYSIS □ 66

5.13.1 □ DYNAMIC POSITIONING □ 66

5.13.2 □ DATA ANALYTICS AND MANAGEMENT □ 66

?

5.14 □ USE CASE ANALYSIS □ 67

5.14.1 □ USE CASE: INTEGRATED NAVIGATION SYSTEMS FOR ENHANCED MARITIME NAVIGATION □ 67

5.14.2 □ USE CASE: DIGITIZING ENGINE CONTROL SYSTEMS FOR OPERATIONAL EFFICIENCY □ 67

5.14.3 □ USE CASE: IOT-BASED MARITIME SERVICES FOR DIGITAL COMMUNICATIONS □ 67

6 □ INDUSTRY TRENDS □ 68

6.1 □ INTRODUCTION □ 68

FIGURE 31 □ TECHNOLOGY ROADMAP IN MARINE ONBOARD COMMUNICATION AND CONTROL SYSTEMS MARKET, 2000-2025 □ 68

6.2 □ TECHNOLOGY TRENDS □ 69

FIGURE 32 □ TECHNOLOGICAL TRENDS IN MARINE ONBOARD COMMUNICATION AND CONTROL SYSTEMS MARKET □ 69

6.2.1 □ ADVANCED SATELLITE COMMUNICATION □ 69

6.2.2 □ REMOTE MONITORING AND CONTROL SYSTEMS □ 70

6.2.3 □ INTEGRATED BRIDGE SYSTEMS □ 70

6.2.4 □ INTEGRATION OF ADVANCED SENSORS □ 70

6.2.5 □ DIGITALIZATION AND BIG DATA ANALYTICS □ 70

6.3 □ IMPACT OF MEGATRENDS □ 71

6.3.1 □ INTERNET OF THINGS (IOT) □ 71

6.3.2 □ ARTIFICIAL INTELLIGENCE AND MACHINE LEARNING □ 71

6.3.3 □ CYBERSECURITY □ 71

6.4 □ SUPPLY CHAIN ANALYSIS □ 72

FIGURE 33 □ SUPPLY CHAIN ANALYSIS □ 72

6.5 □ PATENT ANALYSIS □ 73

FIGURE 34 □ LIST OF MAJOR PATENTS RELATED TO MARINE ONBOARD COMMUNICATION AND CONTROL SYSTEMS MARKET □ 73

TABLE 14 □ LIST OF MAJOR PATENTS FOR MARINE ONBOARD COMMUNICATION AND CONTROL SYSTEMS (2022-2023) □ 74

7 □ MARINE ONBOARD COMMUNICATION AND CONTROL SYSTEMS MARKET, BY TYPE □ 76

7.1 □ INTRODUCTION □ 77

FIGURE 35 □ CONTROL SYSTEMS SEGMENT TO REGISTER HIGHER CAGR FROM 2023 TO 2028 □ 77

TABLE 15 □ MARINE ONBOARD COMMUNICATION AND CONTROL SYSTEMS MARKET, BY TYPE, 2019-2022 (USD MILLION) □ 77

TABLE 16 □ MARINE ONBOARD COMMUNICATION AND CONTROL SYSTEMS MARKET, BY TYPE, 2023-2028 (USD MILLION) □ 78

7.2 □ COMMUNICATION SYSTEMS □ 78

7.2.1 RISING DEMAND FOR SECURE AND RELIABLE MARINE COMMUNICATION TO DRIVE MARKET 78

FIGURE 36 ONBOARD SATELLITE COMMUNICATION SYSTEMS SUBSEGMENT TO REGISTER HIGHEST CAGR FROM 2023 TO 2028 78

TABLE 17 MARINE ONBOARD COMMUNICATION SYSTEMS MARKET, BY TYPE, 2019-2022 (USD MILLION) 79

TABLE 18 MARINE ONBOARD COMMUNICATION SYSTEMS MARKET, BY TYPE, 2023-2028 (USD MILLION) 79

7.2.2 ONBOARD SATELLITE COMMUNICATION SYSTEMS 79

7.2.3 RADIO SYSTEMS 79

7.2.4 ONBOARD BROADBAND SYSTEMS 80

7.2.5 OTHER COMMUNICATION SYSTEMS 80

7.3 CONTROL SYSTEMS 80

7.3.1 INCREASING NEED TO REDUCE FUEL EMISSIONS AND INCREASE VESSEL EFFICIENCY TO DRIVE MARKET 80

FIGURE 37 NAVIGATION AND POSITIONING CONTROL SYSTEMS SUBSEGMENT TO REGISTER HIGHEST CAGR FROM 2023 TO 2028 81

TABLE 19 MARINE ONBOARD CONTROL SYSTEMS MARKET, BY TYPE, 2019-2022 (USD MILLION) 81

TABLE 20 MARINE ONBOARD CONTROL SYSTEMS MARKET, BY TYPE, 2023-2028 (USD MILLION) 81

7.3.2 NAVIGATION AND POSITIONING CONTROL SYSTEMS 82

7.3.3 ENGINE AND PROPULSION CONTROL SYSTEMS 82

7.3.4 MONITORING AND SURVEILLANCE CONTROL SYSTEMS 82

7.3.5 OTHER CONTROL SYSTEMS 82

8 MARINE ONBOARD COMMUNICATION AND CONTROL SYSTEMS MARKET, BY END USER 83

8.1 INTRODUCTION 84

FIGURE 38 OEM SEGMENT TO REGISTER HIGHER CAGR THAN AFTERMARKET SEGMENT FROM 2023 TO 2028 84

TABLE 21 MARINE ONBOARD COMMUNICATION AND CONTROL SYSTEMS MARKET, BY END USER, 2019-2022 (USD MILLION) 84

TABLE 22 MARINE ONBOARD COMMUNICATION AND CONTROL SYSTEMS MARKET, BY END USER, 2023-2028 (USD MILLION) 84

8.2 OEM 85

8.2.1 GROWING NEED FOR HIGH-QUALITY AND COST-EFFECTIVE MARINE ONBOARD SYSTEMS AND COMPONENTS TO DRIVE MARKET 85

8.3 AFTERMARKET 85

8.3.1 RETROFITTING PROJECTS AND DEVELOPMENT OF ADVANCED ONBOARD SYSTEMS TO DRIVE MARKET 85

9 MARINE ONBOARD COMMUNICATION AND CONTROL SYSTEMS MARKET, BY PLATFORM 86

9.1 INTRODUCTION 87

FIGURE 39 DEFENSE SEGMENT TO REGISTER HIGHER CAGR THAN COMMERCIAL SEGMENT FROM 2023 TO 2028 87

TABLE 23 MARINE ONBOARD COMMUNICATION AND CONTROL SYSTEMS MARKET, BY PLATFORM, 2019-2022 (USD MILLION) 87

TABLE 24 MARINE ONBOARD COMMUNICATION AND CONTROL SYSTEMS MARKET, BY PLATFORM, 2023-2028 (USD MILLION) 87

9.2 COMMERCIAL 88

9.2.1 INCREASING MARITIME TOURISM AND SEABORN TRADE TO DRIVE MARKET 88

FIGURE 40 PASSENGER VESSELS SUBSEGMENT TO REGISTER HIGHEST CAGR FROM 2023 TO 2028 88

TABLE 25 MARINE ONBOARD COMMUNICATION AND CONTROL SYSTEMS MARKET, BY COMMERCIAL PLATFORM, 2019-2022 (USD MILLION) 88

TABLE 26 MARINE ONBOARD COMMUNICATION AND CONTROL SYSTEMS MARKET, BY COMMERCIAL PLATFORM, 2023-2028 (USD MILLION) 89

9.2.2 PASSENGER VESSELS 89

9.2.2.1 Yachts 89

9.2.2.2 Ferries 89

9.2.2.3 Cruise ships 89

9.2.3 CARGO VESSELS 89

9.2.3.1 Container vessels 89

9.2.3.2 Bulk carriers 90

Scotts International. EU Vat number: PL 6772247784

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

9.2.3.3 Tankers 90

9.2.3.4 Gas tankers 90

9.2.3.5 Dry cargo ships 90

9.2.3.6 Barges 90

9.2.4 OTHER SHIPS 90

9.2.4.1 Specialized vessels 90

9.2.4.2 Offshore vessels 91

9.2.4.3 Research vessels 91

9.3 DEFENSE 91

9.3.1 RISING DEMAND FOR HIGHLY SECURE NAVAL COMMUNICATION SYSTEMS TO DRIVE MARKET 91

FIGURE 41 AMPHIBIOUS SHIPS SUBSEGMENT TO REGISTER HIGHEST CAGR FROM 2023 TO 2028 91

TABLE 27 MARINE ONBOARD COMMUNICATION AND CONTROL SYSTEMS MARKET, BY DEFENSE PLATFORM, 2019-2022 (USD MILLION) 92

TABLE 28 MARINE ONBOARD COMMUNICATION AND CONTROL SYSTEMS MARKET, BY DEFENSE PLATFORM, 2023-2028 (USD MILLION) 92

9.3.2 AIRCRAFT CARRIERS 92

9.3.3 CORVETTES 92

9.3.4 FRIGATES 93

9.3.5 SUBMARINES 93

9.3.6 DESTROYERS 93

9.3.7 AMPHIBIOUS SHIPS 93

?

10 MARINE ONBOARD COMMUNICATION AND CONTROL SYSTEMS MARKET, BY REGION 94

10.1 INTRODUCTION 95

FIGURE 42 ASIA PACIFIC TO ACCOUNT FOR LARGEST MARKET SHARE IN 2023 95

TABLE 29 MARINE ONBOARD COMMUNICATION AND CONTROL SYSTEMS MARKET, BY REGION, 2019-2022 (USD MILLION) 96

TABLE 30 MARINE ONBOARD COMMUNICATION AND CONTROL SYSTEMS MARKET, BY REGION, 2023-2028 (USD MILLION) 96

10.2 NORTH AMERICA 96

10.2.1 NORTH AMERICA: RECESSION IMPACT ANALYSIS 97

FIGURE 43 NORTH AMERICA: NAVAL BUDGET TREND, BY COUNTRY, 2019-2022 97

TABLE 31 NORTH AMERICA: RECESSION IMPACT ANALYSIS 97

10.2.2 NORTH AMERICA: PESTLE ANALYSIS 98

10.2.2.1 Political 98

10.2.2.2 Economic 98

10.2.2.3 Social 98

10.2.2.4 Technological 98

10.2.2.5 Legal 98

10.2.2.6 Environmental 98

FIGURE 44 NORTH AMERICA: MARINE ONBOARD COMMUNICATION AND CONTROL SYSTEMS MARKET SNAPSHOT 99

TABLE 32 NORTH AMERICA: MARINE ONBOARD COMMUNICATION AND CONTROL SYSTEMS, BY COUNTRY, 2019-2022 (USD MILLION) 99

TABLE 33 NORTH AMERICA: MARINE ONBOARD COMMUNICATION AND CONTROL SYSTEMS, BY COUNTRY, 2023-2028 (USD MILLION) 100

TABLE 34 NORTH AMERICA: MARINE ONBOARD COMMUNICATION AND CONTROL SYSTEMS MARKET, BY TYPE, 2019-2022 (USD MILLION) 100

TABLE 35 NORTH AMERICA: MARINE ONBOARD COMMUNICATION AND CONTROL SYSTEMS MARKET, BY TYPE, 2023-2028 (USD MILLION) 100

Scotts International. EU Vat number: PL 6772247784

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

TABLE 36 NORTH AMERICA: MARINE ONBOARD COMMUNICATION AND CONTROL SYSTEMS MARKET, BY END USER, 2019-2022 (USD MILLION) 100

TABLE 37 NORTH AMERICA: MARINE ONBOARD COMMUNICATION AND CONTROL SYSTEMS MARKET, BY END USER, 2023-2028 (USD MILLION) 101

10.2.3 US 101

10.2.3.1 Rising investment in advanced marine onboard control and communication systems to drive market 101

TABLE 38 US: MARINE ONBOARD COMMUNICATION AND CONTROL SYSTEMS MARKET, BY TYPE, 2019-2022 (USD MILLION) 101

TABLE 39 US: MARINE ONBOARD COMMUNICATION AND CONTROL SYSTEMS MARKET, BY TYPE, 2023-2028 (USD MILLION) 101

TABLE 40 US: MARINE ONBOARD COMMUNICATION AND CONTROL SYSTEMS MARKET, BY END USER, 2019-2022 (USD MILLION) 102

TABLE 41 US: MARINE ONBOARD COMMUNICATION AND CONTROL SYSTEMS MARKET, BY END USER, 2023-2028 (USD MILLION) 102 ?

10.2.4 CANADA 102

10.2.4.1 Increasing number of commercial marine vessels for seaborne trade to drive market 102

TABLE 42 CANADA: MARINE ONBOARD COMMUNICATION AND CONTROL SYSTEMS MARKET, BY TYPE, 2019-2022 (USD MILLION) 102

TABLE 43 CANADA: MARINE ONBOARD COMMUNICATION AND CONTROL SYSTEMS MARKET, BY TYPE, 2023-2028 (USD MILLION) 103

TABLE 44 CANADA: MARINE ONBOARD COMMUNICATION AND CONTROL SYSTEMS MARKET, BY END USER, 2019-2022 (USD MILLION) 103

TABLE 45 CANADA: MARINE ONBOARD COMMUNICATION AND CONTROL SYSTEMS MARKET, BY END USER, 2023-2028 (USD MILLION) 103

10.3 EUROPE 103

10.3.1 EUROPE: RECESSION IMPACT ANALYSIS 104

FIGURE 45 EUROPE: NAVAL BUDGET TREND, BY COUNTRY, 2019-2022 104

TABLE 46 EUROPE: RECESSION IMPACT ANALYSIS 104

10.3.2 EUROPE: PESTLE ANALYSIS 105

10.3.2.1 Political 105

10.3.2.2 Economic 105

10.3.2.3 Social 105

10.3.2.4 Technological 105

10.3.2.5 Legal 105

10.3.2.6 Environmental 105

FIGURE 46 EUROPE: MARINE ONBOARD COMMUNICATION AND CONTROL SYSTEMS MARKET SNAPSHOT 106

TABLE 47 EUROPE: MARINE ONBOARD COMMUNICATION AND CONTROL SYSTEMS MARKET, BY COUNTRY, 2019-2022 (USD MILLION) 107

TABLE 48 EUROPE: MARINE ONBOARD COMMUNICATION AND CONTROL SYSTEMS MARKET, BY COUNTRY, 2023-2028 (USD MILLION) 107

TABLE 49 EUROPE: MARINE ONBOARD COMMUNICATION AND CONTROL SYSTEMS MARKET, BY END USER, 2019-2022 (USD MILLION) 107

TABLE 50 EUROPE: MARINE ONBOARD COMMUNICATION AND CONTROL SYSTEMS MARKET, BY END USER, 2023-2028 (USD MILLION) 108

TABLE 51 EUROPE: MARINE ONBOARD COMMUNICATION AND CONTROL SYSTEMS MARKET, BY TYPE, 2019-2022 (USD MILLION) 108

TABLE 52 EUROPE: MARINE ONBOARD COMMUNICATION AND CONTROL SYSTEMS MARKET, BY TYPE, 2023-2028 (USD MILLION) 108

10.3.3 UK 108

10.3.3.1 Increasing investment in maritime industry to drive market 108

TABLE 53 UK: MARINE ONBOARD COMMUNICATION AND CONTROL SYSTEMS MARKET, BY END USER, 2019-2022 (USD MILLION) 109

TABLE 54 UK: MARINE ONBOARD COMMUNICATION AND CONTROL SYSTEMS MARKET, BY END USER, 2023-2028 (USD MILLION) 109

TABLE 55 UK: MARINE ONBOARD COMMUNICATION AND CONTROL SYSTEMS MARKET, BY TYPE, 2019-2022 (USD MILLION) 109

TABLE 56 UK: MARINE ONBOARD COMMUNICATION AND CONTROL SYSTEMS MARKET, BY TYPE, 2023-2028 (USD MILLION) 109

Scotts International. EU Vat number: PL 6772247784

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

10.3.4 FRANCE 110

10.3.4.1 Increasing investment in R&D for propulsion control systems to drive market 110

TABLE 57 FRANCE: MARINE ONBOARD COMMUNICATION AND CONTROL SYSTEMS MARKET, BY END USER, 2019-2022 (USD MILLION) 110

TABLE 58 FRANCE: MARINE ONBOARD COMMUNICATION AND CONTROL SYSTEMS MARKET, BY END USER, 2023-2028 (USD MILLION) 110

TABLE 59 FRANCE: MARINE ONBOARD COMMUNICATION AND CONTROL SYSTEMS MARKET, BY TYPE, 2019-2022 (USD MILLION) 111

TABLE 60 FRANCE: MARINE ONBOARD COMMUNICATION AND CONTROL SYSTEMS MARKET, BY TYPE, 2023-2028 (USD MILLION) 111

10.3.5 ITALY 111

10.3.5.1 Growing marine fleet size for various purposes to drive market 111

TABLE 61 ITALY: MARINE ONBOARD COMMUNICATION AND CONTROL SYSTEMS MARKET, BY END USER, 2019-2022 (USD MILLION) 111

TABLE 62 ITALY: MARINE ONBOARD COMMUNICATION AND CONTROL SYSTEMS MARKET, BY END USER, 2023-2028 (USD MILLION) 112

TABLE 63 ITALY: MARINE ONBOARD COMMUNICATION AND CONTROL SYSTEMS MARKET, BY TYPE, 2019-2022 (USD MILLION) 112

TABLE 64 ITALY: MARINE ONBOARD COMMUNICATION AND CONTROL SYSTEMS MARKET, BY TYPE, 2023-2028 (USD MILLION) 112

10.3.6 GERMANY 112

10.3.6.1 Rising government initiative to modernize maritime industry to drive market 112

TABLE 65 GERMANY: MARINE ONBOARD COMMUNICATION AND CONTROL SYSTEMS MARKET, BY END USER, 2019-2022 (USD MILLION) 113

TABLE 66 GERMANY: MARINE ONBOARD COMMUNICATION AND CONTROL SYSTEMS MARKET, BY END USER, 2023-2028 (USD MILLION) 113

TABLE 67 GERMANY: MARINE ONBOARD COMMUNICATION AND CONTROL SYSTEMS MARKET, BY TYPE, 2019-2022 (USD MILLION) 113

TABLE 68 GERMANY: MARINE ONBOARD COMMUNICATION AND CONTROL SYSTEMS MARKET, BY TYPE, 2023-2028 (USD MILLION) 113

10.3.7 RUSSIA 114

10.3.7.1 Increasing government initiatives to develop maritime industry to drive market 114

TABLE 69 RUSSIA: MARINE ONBOARD COMMUNICATION AND CONTROL SYSTEMS MARKET, BY END USER, 2019-2022 (USD MILLION) 114

TABLE 70 RUSSIA: MARINE ONBOARD COMMUNICATION AND CONTROL SYSTEMS MARKET, BY END USER, 2023-2028 (USD MILLION) 114

TABLE 71 RUSSIA: MARINE ONBOARD COMMUNICATION AND CONTROL SYSTEMS MARKET, BY TYPE, 2019-2022 (USD MILLION) 114

TABLE 72 RUSSIA: MARINE ONBOARD COMMUNICATION AND CONTROL SYSTEMS MARKET, BY TYPE, 2023-2028 (USD MILLION) 115

10.3.8 REST OF EUROPE 115

TABLE 73 REST OF EUROPE: MARINE ONBOARD COMMUNICATION AND CONTROL SYSTEMS MARKET, BY END USER, 2019-2022 (USD MILLION) 115

TABLE 74 REST OF EUROPE: MARINE ONBOARD COMMUNICATION AND CONTROL SYSTEMS MARKET, BY END USER, 2023-2028 (USD MILLION) 115

TABLE 75 REST OF EUROPE: MARINE ONBOARD COMMUNICATION AND CONTROL SYSTEMS MARKET, BY TYPE, 2019-2022 (USD MILLION) 116

TABLE 76 REST OF EUROPE: MARINE ONBOARD COMMUNICATION AND CONTROL SYSTEMS MARKET, BY TYPE, 2023-2028 (USD MILLION) 116

10.4 ASIA PACIFIC 116

10.4.1 ASIA PACIFIC: RECESSION IMPACT ANALYSIS 117

FIGURE 47 ASIA PACIFIC: NAVAL BUDGET TREND, BY COUNTRY, 2019-2022 117

TABLE 77 ASIA PACIFIC: RECESSION IMPACT ANALYSIS 117

Scotts International. EU Vat number: PL 6772247784

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

10.4.2 ASIA PACIFIC: PESTLE ANALYSIS 118

10.4.2.1 Political 118

10.4.2.2 Economic 118

10.4.2.3 Social 118

10.4.2.4 Technological 118

10.4.2.5 Legal 118

10.4.2.6 Environmental 118

FIGURE 48 ASIA PACIFIC: MARINE ONBOARD COMMUNICATION AND CONTROL SYSTEMS MARKET SNAPSHOT 119

TABLE 78 ASIA PACIFIC: MARINE ONBOARD COMMUNICATION AND CONTROL SYSTEMS MARKET, BY COUNTRY, 2019-2022 (USD MILLION) 120

TABLE 79 ASIA PACIFIC: MARINE ONBOARD COMMUNICATION AND CONTROL SYSTEMS MARKET, BY COUNTRY, 2023-2028 (USD MILLION) 120

TABLE 80 ASIA PACIFIC: MARINE ONBOARD COMMUNICATION AND CONTROL SYSTEMS MARKET, BY END USER, 2019-2022 (USD MILLION) 120

TABLE 81 ASIA PACIFIC: MARINE ONBOARD COMMUNICATION AND CONTROL SYSTEMS MARKET, BY END USER, 2023-2028 (USD MILLION) 121

TABLE 82 ASIA PACIFIC: MARINE ONBOARD COMMUNICATION AND CONTROL SYSTEMS MARKET, BY TYPE, 2019-2022 (USD MILLION) 121

TABLE 83 ASIA PACIFIC: MARINE ONBOARD COMMUNICATION AND CONTROL SYSTEMS MARKET, BY TYPE, 2023-2028 (USD MILLION) 121

10.4.3 CHINA 121

10.4.3.1 Expanding domestic ship production to drive market 121

TABLE 84 CHINA: MARINE ONBOARD COMMUNICATION AND CONTROL SYSTEMS MARKET, BY END USER, 2019-2022 (USD MILLION) 122

TABLE 85 CHINA: MARINE ONBOARD COMMUNICATION AND CONTROL SYSTEMS MARKET, BY END USER, 2023-2028 (USD MILLION) 122

TABLE 86 CHINA: MARINE ONBOARD COMMUNICATION AND CONTROL SYSTEMS MARKET, BY TYPE, 2019-2022 (USD MILLION) 122

TABLE 87 CHINA: MARINE ONBOARD COMMUNICATION AND CONTROL SYSTEMS MARKET, BY TYPE, 2023-2028 (USD MILLION) 122

10.4.4 INDIA 123

10.4.4.1 Rapid development of naval ship components to drive market 123

TABLE 88 INDIA: MARINE ONBOARD COMMUNICATION AND CONTROL SYSTEMS MARKET, BY END USER, 2019-2022 (USD MILLION) 123

TABLE 89 INDIA: MARINE ONBOARD COMMUNICATION AND CONTROL SYSTEMS MARKET, BY END USER, 2023-2028 (USD MILLION) 123

TABLE 90 INDIA: MARINE ONBOARD COMMUNICATION AND CONTROL SYSTEMS MARKET, BY TYPE, 2019-2022 (USD MILLION) 123

TABLE 91 INDIA: MARINE ONBOARD COMMUNICATION AND CONTROL SYSTEMS MARKET, BY TYPE, 2023-2028 (USD MILLION) 124

10.4.5 JAPAN 124

10.4.5.1 Increasing global seaborne trade to drive market 124

TABLE 92 JAPAN: MARINE ONBOARD COMMUNICATION AND CONTROL SYSTEMS MARKET, BY END USER, 2019-2022 (USD MILLION) 124

TABLE 93 JAPAN: MARINE ONBOARD COMMUNICATION AND CONTROL SYSTEMS MARKET, BY END USER, 2023-2028 (USD MILLION) 124

TABLE 94 JAPAN: MARINE ONBOARD COMMUNICATION AND CONTROL SYSTEMS MARKET, BY TYPE, 2019-2022 (USD MILLION) 125

TABLE 95 JAPAN: MARINE ONBOARD COMMUNICATION AND CONTROL SYSTEMS MARKET, BY TYPE, 2023-2028 (USD MILLION) 125

10.4.6 AUSTRALIA 125

10.4.6.1 Increasing government investment in manufacturing naval vessels to drive market 125

TABLE 96 AUSTRALIA: MARINE ONBOARD COMMUNICATION AND CONTROL SYSTEMS MARKET, BY END USER, 2019-2022 (USD

Scotts International. EU Vat number: PL 6772247784

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

MILLION) 125

TABLE 97 AUSTRALIA: MARINE ONBOARD COMMUNICATION AND CONTROL SYSTEMS MARKET, BY END USER, 2023-2028 (USD MILLION) 126

TABLE 98 AUSTRALIA: MARINE ONBOARD COMMUNICATION AND CONTROL SYSTEMS MARKET, BY TYPE, 2019-2022 (USD MILLION) 126

TABLE 99 AUSTRALIA: MARINE ONBOARD COMMUNICATION AND CONTROL SYSTEMS MARKET, BY TYPE, 2023-2028 (USD MILLION) 126

10.4.7 SOUTH KOREA 126

10.4.7.1 Technological advancements in development of maritime vessels to drive market 126

TABLE 100 SOUTH KOREA: MARINE ONBOARD COMMUNICATION AND CONTROL SYSTEMS MARKET, BY END USER, 2019-2022 (USD MILLION) 127

TABLE 101 SOUTH KOREA: MARINE ONBOARD COMMUNICATION AND CONTROL SYSTEMS MARKET, BY END USER, 2023-2028 (USD MILLION) 127

TABLE 102 SOUTH KOREA: MARINE ONBOARD COMMUNICATION AND CONTROL SYSTEMS MARKET, BY TYPE, 2019-2022 (USD MILLION) 127

TABLE 103 SOUTH KOREA: MARINE ONBOARD COMMUNICATION AND CONTROL SYSTEMS MARKET, BY TYPE, 2023-2028 (USD MILLION) 127

10.4.8 REST OF ASIA PACIFIC 128

TABLE 104 REST OF ASIA PACIFIC: MARINE ONBOARD COMMUNICATION AND CONTROL SYSTEMS MARKET, BY END USER, 2019-2022 (USD MILLION) 128

TABLE 105 REST OF ASIA PACIFIC: MARINE ONBOARD COMMUNICATION AND CONTROL SYSTEMS MARKET, BY END USER, 2023-2028 (USD MILLION) 128

TABLE 106 REST OF ASIA PACIFIC: MARINE ONBOARD COMMUNICATION AND CONTROL SYSTEMS MARKET, BY TYPE, 2019-2022 (USD MILLION) 128

TABLE 107 REST OF ASIA PACIFIC: MARINE ONBOARD COMMUNICATION AND CONTROL SYSTEMS MARKET, BY TYPE, 2023-2028 (USD MILLION) 129

10.5 MIDDLE EAST 129

10.5.1 MIDDLE EAST: RECESSION IMPACT ANALYSIS 129

10.5.2 MIDDLE EAST: PESTLE ANALYSIS 130

10.5.2.1 Political 130

10.5.2.2 Economic 130

10.5.2.3 Social 130

10.5.2.4 Technological 130

10.5.2.5 Legal 130

10.5.2.6 Environmental 130

FIGURE 49 MIDDLE EAST: MARINE ONBOARD COMMUNICATION AND CONTROL SYSTEMS MARKET SNAPSHOT 131

TABLE 108 MIDDLE EAST: MARINE ONBOARD COMMUNICATION AND CONTROL SYSTEMS MARKET, BY COUNTRY, 2019-2022 (USD MILLION) 131

TABLE 109 MIDDLE EAST: MARINE ONBOARD COMMUNICATION AND CONTROL SYSTEMS MARKET, BY COUNTRY, 2023-2028 (USD MILLION) 132

TABLE 110 MIDDLE EAST: MARINE ONBOARD COMMUNICATION AND CONTROL SYSTEMS MARKET, BY END USER, 2019-2022 (USD MILLION) 132

TABLE 111 MIDDLE EAST: MARINE ONBOARD COMMUNICATION AND CONTROL SYSTEMS MARKET, BY END USER, 2023-2028 (USD MILLION) 132

TABLE 112 MIDDLE EAST: MARINE ONBOARD COMMUNICATION AND CONTROL SYSTEMS MARKET, BY TYPE, 2019-2022 (USD MILLION) 132

TABLE 113 MIDDLE EAST: MARINE ONBOARD COMMUNICATION AND CONTROL SYSTEMS MARKET, BY TYPE, 2023-2028 (USD

Scotts International. EU Vat number: PL 6772247784

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

MILLION) 133

10.5.3 UAE 133

10.5.3.1 Rise in maritime trade to drive market 133

TABLE 114 UAE: MARINE ONBOARD COMMUNICATION AND CONTROL SYSTEMS MARKET, BY END USER, 2019-2022 (USD MILLION) 133

TABLE 115 UAE: MARINE ONBOARD COMMUNICATION AND CONTROL SYSTEMS MARKET, BY END USER, 2023-2028 (USD MILLION) 133

TABLE 116 UAE: MARINE ONBOARD COMMUNICATION AND CONTROL SYSTEMS MARKET, BY TYPE, 2019-2022 (USD MILLION) 134

TABLE 117 UAE: MARINE ONBOARD COMMUNICATION AND CONTROL SYSTEMS MARKET, BY TYPE, 2023-2028 (USD MILLION) 134

10.5.4 SAUDI ARABIA 134

10.5.4.1 Technological advancements in maritime industry to drive market 134

TABLE 118 SAUDI ARABIA: MARINE ONBOARD COMMUNICATION AND CONTROL SYSTEMS MARKET, BY END USER, 2019-2022 (USD MILLION) 134

TABLE 119 SAUDI ARABIA: MARINE ONBOARD COMMUNICATION AND CONTROL SYSTEMS MARKET, BY END USER, 2023-2028 (USD MILLION) 135

TABLE 120 SAUDI ARABIA: MARINE ONBOARD COMMUNICATION AND CONTROL SYSTEMS MARKET, BY TYPE, 2019-2022 (USD MILLION) 135

TABLE 121 SAUDI ARABIA: MARINE ONBOARD COMMUNICATION AND CONTROL SYSTEMS MARKET, BY TYPE, 2023-2028 (USD MILLION) 135

10.5.5 REST OF MIDDLE EAST 135

TABLE 122 REST OF MIDDLE EAST: MARINE ONBOARD COMMUNICATION AND CONTROL SYSTEMS MARKET, BY END USER, 2019-2022 (USD MILLION) 136

TABLE 123 REST OF MIDDLE EAST: MARINE ONBOARD COMMUNICATION AND CONTROL SYSTEMS MARKET, BY END USER, 2023-2028 (USD MILLION) 136

TABLE 124 REST OF MIDDLE EAST: MARINE ONBOARD COMMUNICATION AND CONTROL SYSTEMS MARKET, BY TYPE, 2019-2022 (USD MILLION) 136

TABLE 125 REST OF MIDDLE EAST: MARINE ONBOARD COMMUNICATION AND CONTROL SYSTEMS MARKET, BY TYPE, 2023-2028 (USD MILLION) 136

?

10.6 REST OF THE WORLD 137

10.6.1 REST OF THE WORLD: PESTLE ANALYSIS 137

10.6.1.1 Political 137

10.6.1.2 Economic 137

10.6.1.3 Social 137

10.6.1.4 Technological 137

10.6.1.5 Legal 138

10.6.1.6 Environmental 138

FIGURE 50 REST OF THE WORLD: MARINE ONBOARD COMMUNICATION AND CONTROL SYSTEMS SNAPSHOT 138

TABLE 126 REST OF THE WORLD: MARINE ONBOARD COMMUNICATION AND CONTROL SYSTEMS MARKET, BY REGION, 2019-2022 (USD MILLION) 139

TABLE 127 REST OF THE WORLD: MARINE ONBOARD COMMUNICATION AND CONTROL SYSTEMS MARKET, BY REGION, 2023-2028 (USD MILLION) 139

TABLE 128 REST OF THE WORLD: MARINE ONBOARD COMMUNICATION AND CONTROL SYSTEMS MARKET, BY END USER, 2019-2022 (USD MILLION) 139

TABLE 129 REST OF THE WORLD: MARINE ONBOARD COMMUNICATION AND CONTROL SYSTEMS MARKET, BY END USER, 2023-2028 (USD MILLION) 139

TABLE 130 REST OF THE WORLD: MARINE ONBOARD COMMUNICATION AND CONTROL SYSTEMS MARKET, BY TYPE, 2019-2022

Scotts International. EU Vat number: PL 6772247784

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

(USD MILLION) 140

TABLE 131 REST OF THE WORLD: MARINE ONBOARD COMMUNICATION AND CONTROL SYSTEMS MARKET, BY TYPE, 2023-2028

(USD MILLION) 140

10.6.2 LATIN AMERICA 140

10.6.2.1 Expansion of shipping industry and growing demand for retrofitting existing vessels to drive market 140

TABLE 132 LATIN AMERICA: MARINE ONBOARD COMMUNICATION AND CONTROL SYSTEMS MARKET, BY END USER, 2019-2022 (USD MILLION) 140

TABLE 133 LATIN AMERICA: MARINE ONBOARD COMMUNICATION AND CONTROL SYSTEMS MARKET, BY END USER, 2023-2028 (USD MILLION) 141

TABLE 134 LATIN AMERICA: MARINE ONBOARD COMMUNICATION AND CONTROL SYSTEMS MARKET, BY TYPE, 2019-2022 (USD MILLION) 141

TABLE 135 LATIN AMERICA: MARINE ONBOARD COMMUNICATION AND CONTROL SYSTEMS MARKET, BY TYPE, 2023-2028 (USD MILLION) 141

10.6.3 AFRICA 141

10.6.3.1 Increasing maritime trade activities to drive market 141

TABLE 136 AFRICA: MARINE ONBOARD COMMUNICATION AND CONTROL SYSTEMS MARKET, BY END USER, 2019-2022 (USD MILLION) 142

TABLE 137 AFRICA: MARINE ONBOARD COMMUNICATION AND CONTROL SYSTEMS MARKET, BY END USER, 2023-2028 (USD MILLION) 142

TABLE 138 AFRICA: MARINE ONBOARD COMMUNICATION AND CONTROL SYSTEMS MARKET, BY TYPE, 2019-2022 (USD MILLION) 142

TABLE 139 AFRICA: MARINE ONBOARD COMMUNICATION AND CONTROL SYSTEMS MARKET, BY TYPE, 2023-2028 (USD MILLION) 142

?

11 COMPETITIVE LANDSCAPE 143

11.1 INTRODUCTION 143

TABLE 140 STRATEGIES ADOPTED BY KEY PLAYERS IN MARINE ONBOARD COMMUNICATION AND CONTROL SYSTEMS MARKET, 2022-2023 143

11.2 MARKET RANKING ANALYSIS 144

FIGURE 51 MARKET RANKING OF TOP 5 PLAYERS, 2022 144

11.3 REVENUE ANALYSIS 145

FIGURE 52 REVENUE ANALYSIS OF TOP 5 PLAYERS, 2018-2022 145

11.4 MARKET SHARE ANALYSIS 145

FIGURE 53 MARKET SHARE ANALYSIS OF TOP 5 PLAYERS, 2022 145

TABLE 141 MARINE ONBOARD COMMUNICATION AND CONTROL SYSTEMS MARKET: DEGREE OF COMPETITION 146

11.5 COMPANY EVALUATION MATRIX 148

11.5.1 STARS 148

11.5.2 EMERGING LEADERS 148

11.5.3 PERVASIVE PLAYERS 148

11.5.4 PARTICIPANTS 148

FIGURE 54 COMPANY EVALUATION MATRIX, 2022 149

11.5.5 COMPANY FOOTPRINT 150

TABLE 142 COMPANY FOOTPRINT, BY TYPE 150

TABLE 143 COMPANY FOOTPRINT, BY PLATFORM 151

TABLE 144 COMPANY FOOTPRINT, BY REGION 152

TABLE 145 COMPANY OVERALL FOOTPRINT 153

11.6 START-UP/SME EVALUATION MATRIX 154

11.6.1 PROGRESSIVE COMPANIES 154

11.6.2 RESPONSIVE COMPANIES 154

Scotts International. EU Vat number: PL 6772247784

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

11.6.3 DYNAMIC COMPANIES 154

11.6.4 STARTING BLOCKS 154

FIGURE 55 START-UP/SME EVALUATION MATRIX, 2022 155

11.6.5 COMPETITIVE BENCHMARKING 156

TABLE 146 LIST OF KEY START-UPS/SMES 156

TABLE 147 COMPETITIVE BENCHMARKING OF KEY START-UPS/SMES 156

11.7 COMPETITIVE SCENARIOS AND TRENDS 157

11.7.1 PRODUCT LAUNCHES 157

TABLE 148 PRODUCT LAUNCHES, 2021-2023 157

11.7.2 DEALS 158

TABLE 149 DEALS, 2020-2023 158

**Marine Onboard Communication and Control Systems Market by Type
(Communication Systems, Control Systems), Platform (Commercial, Defense), End
User (OEM, Aftermarket) and Region (North America, Europe, APAC, MEA, RoW) -
Global Forecast to 2028**

Market Report | 2023-12-18 | 222 pages | MarketsandMarkets

To place an Order with Scotts International:

- Print this form
- Complete the relevant blank fields and sign
- Send as a scanned email to support@scotts-international.com

ORDER FORM:

Select license	License	Price
	Single User	\$4950.00
	Multi User	\$6650.00
	Corporate License	\$8150.00
	Enterprise Site License	\$10000.00
		VAT
		Total

*Please circle the relevant license option. For any questions please contact support@scotts-international.com or 0048 603 394 346.

** VAT will be added at 23% for Polish based companies, individuals and EU based companies who are unable to provide a valid EU Vat Numbers.

Email*	<input type="text"/>	Phone*	<input type="text"/>
First Name*	<input type="text"/>	Last Name*	<input type="text"/>
Job title*	<input type="text"/>		
Company Name*	<input type="text"/>	EU Vat / Tax ID / NIP number*	<input type="text"/>
Address*	<input type="text"/>	City*	<input type="text"/>

Scotts International. EU Vat number: PL 6772247784

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

Zip Code*

Country*

Date

2025-05-19

Signature

Scotts International. EU Vat number: PL 6772247784

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com