Aircraft Antenna - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts 2019 - 2029

Market Report | 2024-02-17 | 110 pages | Mordor Intelligence

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Report description:

The Aircraft Antenna Market is valued at USD 544.68 billion in 2024 and is expected to reach USD 732.68 billion by 2029, registering a CAGR of 6.11% during the forecast period.

The development of next-generation aircraft for commercial, military, and general aviation is fuelling the demand for antennas with a smaller size, high gain, and bandwidth. For instance, the increasing demand for better connectivity onboard commercial aircraft led to the installation of Ku-/Ka-band antennas to support SATCOM solutions. Increasing passenger traffic in the commercial aviation industry and the need for a separate and encrypted channel for communication in the military sector (for both manned and unmanned platforms) are fuelling investments in the development of advanced antennas that provide large and secure bandwidth.

Other factors driving the global market are the increasing demand for military exercises by unmanned aerial vehicles and the growing acceptance of advanced communication and navigation systems. Military agencies are investing in developing military-grade drones that will be used on the battlefield. Reliable communication becomes a key aspect in such military applications of UAVs. In turn, the key players gain productive accreditations, leading to growth in innovation and operational similarity.

Aircraft Antenna Market Trends

The Military Segment to Experience the Highest Growth During the Forecast Period

The increasing military spending of countries around the world fueled the plans for procurements of new generation aircraft and

modernization of existing aircraft with advanced technology. For FY 2022, the US Department of Defense (DoD) requested a defense budget of USD 753 billion to make its military force a more lethal, agile, and innovative joint force. Under this budget, the DoD planned to invest in the development of future attack reconnaissance aircraft, future long-range assault aircraft, and sixth-generation combat aircraft within the Next Generation Air Dominance program. These programs are in their initial stages, due to which the aircraft antenna manufacturers can capture new contracts for such programs to increase their presence in the market.

For instance, in March 2023, the United States Air Force Research Laboratory (AFRL) contracted with ThinKom Solutions, Inc. to deliver a modular and scalable phased-array antenna solution (ThinKom gateway array). Initially funded as a development contract, the offering takes advantage of ThinKom's patented Variable Inclination Continuous Transverse Stub (VICTS) architecture. Similarly, in June 2023, CesiumAstro won a US Air Force USD 3.6 million contract to develop a phased array antenna for remotely piloted drones. CesiumAstro will scale its SATCOM terminal to fit the size, weight, and power (SWaP) requirements of a Group 5 unmanned aerial system (UAS). The terminal will be integrated on a General Atomics MQ-9A capital asset to demo connectivity benefits with a commercial satellite network.

The Asia-Pacific Region is Expected to Generate the Highest Demand During the Forecast Period

The Asia-Pacific region is achieving unprecedented long-term growth in commercial aviation, backed up by a large number of aircraft scheduled for future delivery to carriers in the region. This increasing air fleet is helping the airlines to increase the connectivity to/from/within the region to support a wide spectrum of industries, like tourism and trade. The new aircraft are fitted with advanced antenna systems as travelers are increasingly opting for better onboard connectivity services. Companies are bringing new IFC services to passengers to enhance their experience.

Moreover, the growth of military spending of countries in the region is supporting the development and procurement of new-generation advanced military aircraft. For instance, China's proposed FY2023 defense spending 2023 rose to USD 225 billion, which is 7.2% higher than the budget allocated for FY2022 and is the eighth consecutive year of increase in its military spending. Similarly, India's proposed defense expenditure for FY 2023 is USD 72.6 billion, which is 13% up from the previous period's initial estimates and is aimed towards the acquisition of combat aircraft. These aircraft are fitted with advanced antennas to provide better data links between satellite aircraft, aircraft, and aircraft-ground stations. Due to the reasons above, the demand for aircraft antennas in the Asia-Pacific region is expected to register the highest CAGR during the forecast period.

Aircraft Antenna Industry Overview

The aircraft antenna market is moderately consolidated with several players that provide various antennas of various frequency ranges (VHF & UHF Band, Ka/Ku/K Band, X Band, and others) and different shapes and sizes. The prominent players in the aircraft antenna market are Cobham Limited, CMC Electronics Inc., L3Harris Technologies Inc., Honeywell International Inc., and HR Smith Group of Companies. Cobham Limited currently holds the highest market share in the commercial segment, as it provides communication and navigation antennas to the majority of Airbus and Boeing aircraft. Various players are investing in technological innovations in the design of advanced antenna systems for better and uninterrupted services. Such efforts are envisaged to enhance the business prospects of antenna manufacturers.

For instance, in February 2021, Satcom Direct released its first two Plane Simple satellite communication antennas, bringing lower-cost high-speed connectivity options to a wider array of airframes. While the SD Plane Simple Ku antenna will provide connectivity via Intelsat's broadband Ku-band satellite service, the SD Plane Simple Certus LEO antenna will access Iridium's new Next Low Earth orbit (LEO) L-band constellation and its high-speed Certus service. Similarly, in March 2021, Thinkom Solutions Inc. developed a new product variant of its VICTS aero satellite communication antennas. It enabled more flexible installation choices and allowed for smaller distributed and embedded phased-array applications.

Additional Benefits:

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

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