Connected Aircraft - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts 2024 - 2029

Market Report | 2024-02-17 | 99 pages | Mordor Intelligence

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Report description:

The Connected Aircraft Market is valued at USD 6.16 billion in 2024 and is expected to reach USD 12.2 billion by 2029, registering a CAGR of 14.85% during the forecast period.

An increase in the demand for digitization of the technology used for communication between aircraft and ground control resulted in a rise in demand for the use of the Internet of Things for operating and maintaining aircraft communication functions. The increasing procurement of newer-generation commercial annd military aircraft increased the need for more connectivity aboard aircraft. Moreover, the growing emphasis on the reliability and safety of the aircraft and the passengers made the various aircraft OEMs airlines invest in these connected aircraft technologies. Furthermore, the need to enhance the passenger experience will also contribute to being a major driving factor for the market.

Connected aircraft make use of IP networks to provide internet connection that leads to aircraft operations by making use of real-time data. It, thereby, enables aircraft crew and ground operators to effectively manage and monitor aircraft position and functions. Emerging trends, with a direct impact on the dynamics of the industry, include increased adoption of connected technologies for data transmission, increasing demand for military services and commercial industries, and a shift from seat-centric entertainment systems to portable entertainment systems.

Connected Aircraft Market Trends

Commercial Aircraft is Anticipated to Register Highest Growth

The increase in the number of global air passenger traffic has encouraged fleet expansion of airlines, which in turn has driven the delivery of commercial aircraft by OEMs. the rising passenger traffic has also enhanced the frequency of aviation operations, and the growth in research and development of advanced connected aircraft solutions by various major market players are the major factors that will lead to growth in the market during the coming years.

Throughout 2022, global air passenger traffic gained momentum and recovered substantially as travel restrictions were taken down and passengers expressed a very strong willingness to travel. According to the data presented by the International Air Transport Association (IATA), in 2022, air passenger traffic gained momentum globally. It recovered substantially from 41.7% of 2019 revenue passenger kilometers (RPKs) in 2021 to 68.5% in 2022. Moreover, domestic RPKs recovered to 79.6% of pre-pandemic passenger traffic in 2022 and grew 10.9% year-on-year from 2021 levels. International RPKs recovered to 62.2% of 2019 traffic and grew 152.7% YoY from 2021 levels. Furthermore, an increase in the number of aircraft deliveries worldwide in recent years gave a major boost to the development of advanced connected aircraft systems for commercial aviation.

Boeing almost doubled Airbus in terms of aircraft deliveries to start 2023, with Boeing delivering 38 aircraft in January compared to Airbus delivering 20. In addition, of the 38 aircraft delivered by Boeing, 35 were B737s (all MAX), and three were B787s. On the other hand, in January 2023, Airbus delivered 20 jets, including 16 A320s, two A220s, and one each of the A330 and A350 models. In addition, the official A320 production rate is 45 aircraft per month and remained at this level since the end of 2021. On average, the company delivered 43 A320s per month in 2022. The increase in the number of aircraft deliveries led to various major key players in the market investing heavily in connected aircraft solutions. It is in order to endure smoother aircraft operations and improve the passenger experience on board the aircraft. For instance, in June 2023, Collins Aerospace, a part of RTX Corporation, announced that they developed a wireless connectivity solution for airplane galley inserts, which, according to the company, will provide operational efficiencies and cost savings for airlines while also supporting improved passenger service.

Thus, the growth in the number of air passenger traffic coupled with the increase in the number of commercial aircraft deliveries will propel major players to invest more in connected aircraft for commercial aircraft. It is, thereby, leading to market growth during the forecast period.

Asia-Pacific Will Showcase Remarkable Growth During the Forecast Period

Asia-Pacific is projected to show the highest growth during the forecast period. Increasing air passenger traffic, growth in aviation operations, increasing aircraft delivery, and the presence of various major market players to develop new and advanced connected aircraft systems will lead to the market to the region witnessing significant growth during the forecast period.

Currently, countries such as China, India, Japan, Thailand, and Indonesia are transforming into major aviation hubs in the Asia-Pacific region. Moreover, the increasing air passenger traffic leading to the growth of aviation operations in countries in the Asia-Pacific led to an increase in the demand for the new generation of aircraft to cater to the growing air passenger traffic. It will lead to increasing opportunities for various major market players in the region to invest in research and develop advanced connected systems to be installed onboard the aircraft and also drive passenger satisfaction.

Countries such as China and India are leading in terms of aircraft deliveries. Although China received several orders for their homegrown C919 aircraft (32 customers by the end of 2022), India currently includes more than 1,100 aircraft on order. India is now looking to expand their aviation operations. Thus, Air India, which the Tata Group now owns, in 2023 placed orders for a total of 470 planes with Airbus and Boeing. The total order, comprising wide-body and narrow-body aircraft, is the largest so far by an Indian carrier and one of the largest single aircraft orders in the world. In addition, in the rest of the countries in Asia-Pacific, Airbus dominates commercial aircraft orders.

Thus, the increasing number of aircraft orders in the Asia-Pacific means that there will be significant growth in terms of the development of new and advanced connected aircraft systems by major market players. Thus, it will lead to a positive outlook and market growth during the forecast period.

Connected Aircraft Industry Overview

The connected aircraft market is fragmented in nature, with various players holding significant shares in the market. Some prominent market players are SITA, Honeywell International Inc., THALES, Panasonic Holdings Corporation, and Gogo Inc.

The key players in the market are focusing on the development of advanced connected systems to be installed in new commercial and military aircraft that are being manufactured worldwide. Growing expenditure on research and development towards manufacturing advanced connected aircraft systems will lead to creating better opportunities in the near future.

Moreover, manufacturers are now integrating technologies such as onboard Wi-Fi systems and satellite internet technology into the aircraft for increased passenger flight experience. It is expected to support the growth of the connected aircraft market during the forecast period.

Additional Benefits:

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

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7.1 Increasing focus on predictive maintenance

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