Naval Navigation And Communication Systems - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts (2024 - 2029)

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

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Report description:

The Naval Navigation And Communication Systems Market size is estimated at USD 4.64 billion in 2024, and is expected to reach USD 6.09 billion by 2029, growing at a CAGR of 5.55% during the forecast period (2024-2029).

The constant update and introduction of a series of resolutions and codes on the guidelines on navigation issues and performance standards for shipborne navigational and radiocommunications equipment, namely, the SOLAS, COLREG, and STCW, necessitated the development of new navigation and communication systems, to ensure the safety of naval assets in the seas.

The ongoing R&D toward the development of advanced maritime technologies, such as stealth submarines and unmanned marine systems, is envisioned to inspire potential investments in the development and induction of sophisticated navigation systems, to ensure vessel safety and high-performance communication systems that can ensure the swift, stealthy, and encrypted flow of telemetry data between the naval fleet and the control station.

Moreover, the integration of advanced communication systems among naval forces has catalyzed the expansion of the naval navigation and communications systems market. Enhanced interoperability and real-time data exchange among diverse forces optimize maritime operations, promoting a more secure and efficient environment. As technology evolves, there's a growing demand for sophisticated solutions, propelling the market forward.

Naval Navigation And Communication Systems Market Trends

Communication Systems Segment Expected to Dominate the Market

The advent of network-centric warfare techniques revolutionized the scope of operations of naval vessels, rendering the integration of C4ISR capabilities into the fleet as a critical necessity to optimize the operational and strategic capabilities. Such systems incorporate command-and-control and sensor architecture to shape joint operations. These systems provide direct links to the naval Joint Force Commander from airborne reconnaissance platforms, to ensure a real-time battlefield assessment through ELINT, SIGINT, and high-resolution SAR/MTI technologies. The global navies are adopting an enterprise integration approach to naval C4ISR systems to facilitate the breakdown of restrictive system silos and enable real-time sharing and transmission of terabytes of data. This architecture is aimed at enhancing the naval fleet's capability to harness Big Data analytics for strengthening strategic coordination between the intelligence processing and warfighting units. For instance, the US Navy maintains a worldwide Maritime Command/Surveillance Tactical Support Center (TSC) network that functions as a node for the Joint Maritime Command Information System (JMCIS). The need to ensure the enhancement of naval operational capability encouraged the dissemination of several orders to military contractors for the induction of new communication systems in advanced naval vessels under construction, while also upgrading the capabilities of the integrated systems in last-generation naval vessels. Such developments are envisioned to drive the communication systems segment of the market during the forecast period.

Asia-Pacific is Expected to Witness Highest Growth During the Forecast Period

The strengthening of the strategic military alliances between the US and several Asia-Pacific sovereign nations and subsequent reinforcement of military deployment and intervention resulted in a complex scenario, urging rapid modernization of defense capabilities of regional countries, such as China and India, to safeguard their vested interests. By the mid-2020s, China aims to induct the Type 093B SHANG-class guided-missile nuclear attack submarine. The Indian Navy is determined to build and sustain a technology-enabled and networked naval force capable of safeguarding Indian maritime interests on the high seas and projecting combat power across the littoral. Indian Navy has been focusing on developing indigenous platforms, systems, sensors, and weapons as part of India's modernization and expansion of its navy. As of 2023, the Indian Navy has over 40 vessels of various categories under construction, including destroyers, frigates, corvettes, and conventional-powered and nuclear-powered submarines and according to the plans the Indian Navy induct 200 vessels and 500 aircraft by 2050. Moreover, to indigenously manufacture technologically advanced equipment, in the enactment of the Government of India's vision of 'Make in India', the Indian Navy has gone on board an initiative to evolve a guideline document, the 'Indian Naval Indigenization Plan (INIP) 2015-2030', to enunciate the necessity for indigenously developing various advanced systems for its platforms. Several other programs are underway in the region, which is bolstering the growth prospects of the market during the forecast period.

Naval Navigation And Communication Systems Industry Overview

The naval navigation and communication systems market is fragmented, with many global players present in the market. Some of the prominent players in the market are Northrop Grumman Corporation, Teledyne FLIR LLC, Safran SA, Honeywell International Inc., and Kongsberg Gruppen ASA. To gain long-term contracts and expand their global presence, players are investing significantly in continuous R&D, to foster the advancements of accuracy and efficiency of integrated navigation and communication systems onboard naval vessels. For instance, In May 2023, the Naval Supply Systems Command Weapon Systems Support announced a USD 12 million contract to Honeywell International Inc. Aerospace segment to provide ring laser gyros for the AN/WSN-7 inertial navigation system. The AN/WSN-7 inertial navigation system senses ship motions, computes the ship's accurate position, attitude, velocity, heading, and rates in digital and analog formats, and forwards the data to other vital ship systems. Similarly, Northrop Grumman Corporation is developing the Inertial Navigation Systems Replacement (INS-R) Inertial Sensor Module (ISM) as an upgrade for the WSN-7 navigation system, to empower surface vessels to navigate accurately without GPS satellite navigation.

Additional Benefits:

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

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