SCOTTS INTERNATIONAL

Connected Aircraft - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts (2025 - 2030)

Market Report | 2025-06-01 | 120 pages | Mordor Intelligence

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Report description:

Connected Aircraft Market Analysis

The connected aircraft market size reached USD 8.81 billion in 2025 and is forecasted to expand to USD 14.87 billion by 2030, reflecting an 11.04% CAGR. Sustained growth stems from rising passenger expectations for gate-to-gate broadband, mandated real-time tracking under the ICAO GADSS rule, and multi-orbit satellite deployments that cut latency and bandwidth cost. Airlines broadened retrofit programs to speed digital cabin upgrades, while defense ministries funded network-centric warfare projects that link fourth-generation fighters with advanced sensors. Competitive intensity stayed moderate as incumbents defended positions through long-term service contracts, yet faced pricing pressure from Starlink and other LEO entrants. Cyber-security rules, spectrum congestion, and high retrofit costs moderated near-term rollout plans but did not alter the long-term digital trajectory of the connected aircraft market.

Global Connected Aircraft Market Trends and Insights

Rising Demand for Passenger Inflight Connectivity

Passenger expectations shifted from sporadic email access to streaming-grade bandwidth. An industry survey in 2024 found that 81% of South Korean travelers would rebook with airlines offering quality Wi-Fi, and 80% ranked connectivity important to the flight experience. Carriers like Delta expanded fast, free Wi-Fi to more than 720 aircraft, signaling a shift from paid service to a brand differentiator. Broadband-enabled ancillary revenue was projected to reach USD 30 billion by 2035, reinforcing connectivity as a strategic income stream. The connected aircraft market consequently prioritized passenger-facing upgrades, particularly in North America and Asia-Pacific, where digital engagement drives loyalty.

Adoption of Network-Centric Warfare Driving Military Connectivity

Defense agencies invested in airborne data links that fuse real-time intelligence across domains. The US Air Force Battle Network plan integrated aircraft into a unified digital architecture for seamless information exchange. Lockheed Martin's Sniper Networked Targeting Pod created secure mesh networks between F-35s and fourth-generation fighters. Similar initiatives in the United Kingdom and NATO allies indicated international alignment, extending growth prospects for secure connectivity solutions across the connected aircraft market.

High Retrofit and Certification Cost

Cabin retrofits required expensive equipment, detailed supplemental type certificates, and aircraft downtime. The FAA estimated that cyber-secure connectivity for the US mobility fleet would cost USD 500 million. Airlines balanced these outlays against constrained capital as delivery delays from Airbus and Boeing limited new-build replacements.

Other drivers and restraints analyzed in the detailed report include:

Global ICAO GADSS Mandate for Real-Time Flight Tracking / LEO Satellite Constellations Cutting Bandwidth Cost / Cyber-Security Compliance Delays /

For complete list of drivers and restraints, kindly check the Table Of Contents.

Segment Analysis

Services held 51.45% of the connected aircraft market share in 2024 and are projected to grow at 12.80% CAGR through 2030, underscoring airline preference for turnkey solutions over hardware ownership. The connected aircraft market size for services is expected to expand in line with multi-year agreements that bundle equipment, certification, and 24/7 network operations. Airlines favored predictable operating expenses, particularly when rapid technology refresh cycles risked asset obsolescence.

Service providers deepened value propositions by offering continuous performance analytics, cybersecurity monitoring, and flexible bandwidth plans. Panasonic's 10-year maintenance pact with Riyadh Air illustrated the lifecycle model that keeps fleets current without large upfront costs. Recurring revenue streams improved vendor cash visibility while enabling carriers to focus on customer experience and punctuality.

Inflight connectivity accounted for 62.40% of connected aircraft market share in 2024 as passenger digital lifestyles influenced product roadmaps. Given higher flight frequencies and brand touchpoints, airlines equipped narrowbody fleets first. Air-to-ground links emerged as the fastest-growing subsegment at 14.20% CAGR, supported by 5G surface networks that extend gate connectivity into the climb phase.

Future architectures will blend satellite, cellular, and aircraft-to-aircraft pathways for uninterrupted coverage. The Seamless Air Alliance advanced standards that integrate 3GPP 5G non-terrestrial networks, aligning performance across ground and orbit domains. This evolution keeps the connected aircraft market at the forefront of aviation digitalization.

The Connected Aircraft Market Report is Segmented by Offering (Solution and Services), Connectivity Type (Inflight Connectivity, and More), Connectivity Technology (L-Band, Ku-Band, and More), Application (Commercial Aviation, Military Aviation, and General

Aviation), and Geography (North America, Europe, Asia-Pacific, and More). The Market Forecasts are Provided in Terms of Value (USD).

Geography Analysis

North America led the connected aircraft market in 2024 with a 38.90% share, supported by early compliance with GADSS, robust satellite infrastructure, and carrier commitments to fleet-wide free Wi-Fi. Delta, United, and American rolled out multi-orbit retrofits that aligned regional jets with mainline performance expectations. Defense programs like BACN and the F-22A modernization also lifted demand for secure links across US air assets.

Europe followed with strong regulatory impetus from EASA cybersecurity rules and pan-EU coordinated air traffic modernization. Flag carriers balanced passenger connectivity with operational priorities such as electronic flight bag integration and predictive maintenance platforms. The region's satellite operators accelerated Ka-band deployments to defend their market position against LEO newcomers.

Asia-Pacific posted the fastest 12.65% CAGR outlook through 2030. China's aviation services revenue was projected to rise from USD 23 billion in 2024 to USD 61 billion by 2043, embedding connectivity with a 5.6% CAGR within the broader digital services mix. Thai Airways partnered with Neo Space Group on 80 aircraft retrofits, and Korean Air began commercial B787 flights equipped with Viasat Ka-band. Government support for aviation infrastructure and rising middle-class travel sustained regional tailwinds.

List of Companies Covered in this Report:

Panasonic Avionics Corporation / Viasat, Inc. / Thales Group / Gogo Inc. / RTX Corporation / SITA N.V. / Honeywell International Inc. / Kontron AG / Anuvu Operations LLC, / Burrana Pty Ltd. / Intelsat S.A. / Astronics Corporation / OnOneWeb Holdings Ltd. / SkyFive AG / Telekom Deutschland GmbH / AeroMobile Communications Ltd. / Hughes Network Systems, LLC /

Additional Benefits:

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

Table of Contents:

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