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Global 5G in Aviation Market Size study & Forecast, by Communication Infrastructure (Small cell, DAS, RAN), by Technology (eMBB, URLLC or MMTC, FWA), by End Use (Airport, Aircraft) and Regional Analysis, 2023-2030

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Abstracts

Global 5G in Aviation Market is valued at approximately USD 1.06 billion in 2022 and is anticipated to grow with a healthy growth rate of more than 22.80% during the forecast period 2023-2030. 5G in 5G in aviation refers to the integration of fifth-generation wireless technology into the aviation industry, promising to revolutionize various aspects of air travel. With its high-speed, low-latency connectivity, 5G has the potential to enhance communication, navigation, and surveillance systems, leading to improved safety, efficiency, and passenger experiences. The deployment of 5G in aviation enables real-time data transmission, allowing aircraft to communicate seamlessly with ground control, other aircraft, and various airport systems. This can optimize air traffic management, reduce delays, and enhance overall operational efficiency. Moreover, 5G facilitates in-flight connectivity, enabling passengers to enjoy high-speed internet, streaming services, and other connected experiences while airborne. The 5G in Aviation Market is expanding because of factors such as an upsurge in airline passenger traffic, the development of autonomous ground vehicles for airport operations and the rising development of smart airports.

5G technology offers unprecedented data speeds and low latency, meeting the rising expectations of passengers for seamless and high-quality in-flight connectivity. The demand for real-time internet access, streaming services, and connected experiences during air travel has surged with the growing reliance on digital devices. Airlines are increasingly recognizing the significance of 5G in delivering improved in-flight entertainment, communication, and overall passenger experiences. This demand is not

only driven by the desire for enhanced connectivity and by the airlines' strategic initiatives to differentiate their services and stay competitive in a dynamic aviation landscape. According to the data provided by the International Civil Aviation Organization (ICAO), airlines transported 4.3 billion passengers in 2018. Furthermore, projections indicate that the number of airline passengers is anticipated to surpass 10.0 billion by 2040. This substantial increase underscores the necessity for additional aircraft to accommodate the growing demand for point-to-point travel. As the aviation industry outlook evolves and air passenger preferences undergo changes, there is an increasing demand for advanced, high-bandwidth, real-time, and densely connected network solutions to enhance operational efficiency within the sector. In addition, rising government investment for the integration of 5G technology in the aviation industry and rising technological advancement on the IoT front and implementation of AI. However, rising data security concerns stifle market growth throughout the forecast period of 2023-2030.

The key regions considered for the Global 5G in Aviation Market study includes Asia Pacific, North America, Europe, Latin America, and Middle East & Africa. North America dominated the market in 2022. Major contributors, including Cisco Systems, ANUVU, Gogo, Inseego Corp, Intelsat, Smartsky Networks, Panasonic Avionics, AT&T, T-Mobile, Sprint, Verizon, and Charter, are expected to play a significant role in propelling the growth of the 5G in the Aviation Market. The market dynamics are largely influenced by the growing demand for air travel and enhanced flight experience. The rising passenger traffic, both domestically and internationally, emphasizes the increased necessity for improved internet connectivity in airports and aircraft. Furthermore, the expansion of connected aircraft and the development of smart airports contribute significantly to the overall growth of the regional market. Asia Pacific is expected to grow at the fastest rate over the forecast period. The escalation in budget allocations for aviation infrastructure in China, Japan, and India, coupled with other Asia-Pacific nations, is anticipated to be a driving force for the 5G in the Aviation Market owing to the presence of key market players in the region. Meanwhile, Japan is actively prioritizing the development of 5G infrastructure at airports, aligning with government initiatives. In Australia, Telstra, the largest telecommunications company, has outlined plans to construct 180 5G-ready sites by 2019, significantly catering to the increasing demand for 5G connectivity infrastructure.

Major market player included in this report are:

AeroMobile Communications Limited

Cisco Systems Inc.

Telefonaktiebolaget LM Ericsson

ANUVU Inc. (Global Eagle Entertainment Inc.)

Gogo LLC

Huawei Technologies Co., Ltd.

Inseego Corp.

Intelsat Corporation

Nokia Corporation

OneWeb Ltd.

Recent Developments in the Market:

In November 2022, The European Commission revealed its recent digital strategy update, incorporating directives for airlines to integrate 5G technologies into their onboard systems. This strategic decision is formalized through an 'implementing decision' concerning the allocation of spectrum for mobile communications on aircraft. This permits airline operating within the European Union to provide state-of-the-art 5G technology to passengers during flights. Consequently, travelers can maximize the usage of their mobile phones while in-flight, enjoying features comparable to those available on terrestrial 5G networks.

In June 2022, Airbus disclosed the signing of a Memorandum of Understanding with China Mobile (Shanghai) Industrial Research Institute, a subsidiary of China Mobile with a focus on transportation. The collaborative effort is geared towards expediting the industrialization process and conducting pilot phase flight route trials for the implementation of 5G Air-to-Ground (ATG) connectivity in China. Encompassing a range of initiatives, the partnership aims to develop novel service solutions associated with the connected cabin, enhance the cabin experience, and contribute to digitalization efforts within the aviation industry.

Global 5G in Aviation Market Report Scope:

Historical Data – 2020 - 2021

Base Year for Estimation – 2022

Forecast period - 2023-2030

Report Coverage - Revenue forecast, Company Ranking, Competitive Landscape, Growth factors, and Trends

Segments Covered – Communication Infrastructure, Technology, End Use, Region

Regional Scope - North America; Europe; Asia Pacific; Latin America; Middle East & Africa

Customization Scope - Free report customization (equivalent up to 8 analyst's working hours) with purchase. Addition or alteration to country, regional & segment scope*

The objective of the study is to define market sizes of different segments & countries in recent years and to forecast the values to the coming years. The report is designed to incorporate both qualitative and quantitative aspects of the industry within countries involved in the study.

The report also caters detailed information about the crucial aspects such as driving factors & challenges which will define the future growth of the market. Additionally, it also incorporates potential opportunities in micro markets for stakeholders to invest along with the detailed analysis of competitive landscape and product offerings of key players. The detailed segments and sub-segment of the market are explained below:

By Communication Infrastructure:

Small cell

DAS

RAN

By Technology:

eMBB

URLLC or MMTC

FWA

By End Use:

Airport

Aircraft

By Region:

North America

U.S.

Canada

Europe

UK

Germany

France

Spain

Italy

ROE

Asia Pacific

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India

Japan

Australia

South Korea

RoAPAC

Latin America

Brazil

Mexico

Middle East & Africa

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Rest of Middle East & Africa

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