

# Global Airborne SATCOM Market to Reach USD 10.13 Billion by 2032

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## Abstracts

The global airborne SATCOM (Satellite Communication) market was valued at USD 5.75 billion in 2023 and is projected to expand at a CAGR of 6.50% from 2024 to 2032. The growing demand for uninterrupted communication networks, secure data transmission, and real-time situational awareness has significantly propelled the adoption of airborne SATCOM systems. These systems play a pivotal role in military surveillance, intelligence gathering, commercial aviation connectivity, and emergency response missions, ensuring seamless communication across vast geographies. With technological advancements in satellite networks, increased bandwidth availability, and AI-driven automation in defense communication, the airborne SATCOM market is witnessing a paradigm shift towards enhanced performance and reliability.

The market growth is driven by the rapid expansion of UAVs (Unmanned Aerial Vehicles) in defense and commercial applications, alongside rising investments in next-generation satellite networks. Governments worldwide are actively modernizing military fleets with advanced airborne communication systems to strengthen battlefield connectivity and command operations. Additionally, the surge in commercial airline traffic and passenger demand for in-flight connectivity is fueling the need for high-speed broadband SATCOM solutions. However, challenges such as high deployment costs, cybersecurity threats, and spectrum congestion issues pose hurdles to market expansion. Nonetheless, the emergence of software-defined radios (SDR), high-throughput satellites (HTS), and laser communication technologies is expected to unlock new avenues for market growth.

North America dominates the airborne SATCOM market, primarily due to substantial military spending, extensive adoption of SATCOM technologies in defense operations, and the presence of key aerospace players. The United States remains at the forefront,

spearheading R&D initiatives in satellite-based communication for modern warfare, real-time ISR (Intelligence, Surveillance, and Reconnaissance), and border security. Meanwhile, Europe is witnessing robust growth driven by expanding civil aviation networks, strategic defense collaborations, and regulatory mandates for aircraft connectivity. The Asia-Pacific (APAC) region is expected to experience the fastest growth, fueled by rising defense expenditures in China and India, increasing commercial airline investments, and the proliferation of UAVs for reconnaissance missions.

The competitive landscape of the airborne SATCOM market is evolving rapidly, with industry leaders focusing on next-generation satellite constellations, AI-powered data encryption, and multi-orbit communication capabilities. Companies are forging strategic partnerships with satellite operators, defense agencies, and aviation firms to develop cutting-edge SATCOM solutions that enhance network resilience and operational flexibility. The integration of 5G-based airborne connectivity and real-time AI analytics is set to redefine the market, ensuring unparalleled communication efficiency for military and commercial aviation applications.

#### Major Market Players Included in This Report

Honeywell International Inc.

Thales Group

General Dynamics Corporation

Cobham Limited

Viasat Inc.

L3Harris Technologies, Inc.

Raytheon Technologies Corporation

Iridium Communications Inc.

Gilat Satellite Networks Ltd.

Collins Aerospace (Raytheon Technologies)

SES S.A.

Inmarsat Global Limited

Ball Aerospace & Technologies Corp.

Hughes Network Systems, LLC

Northrop Grumman Corporation

The Detailed Segments and Sub-Segments of the Market Are Explained Below

By Type:

New Installation

Upgrade

By Application:

Government & Defense

Commercial

By Platform:

Fixed Wing

Rotary Wing

UAVs

By Frequency:

L-Band

C-Band

X-Band

Ku-Band

Ka-Band

Others

#### By Component:

Transceivers

Antennas

Modems & Routers

Amplifiers

Others

#### By Region:

North America

U.S.

Canada

Europe

UK

Germany

France

Spain

Italy

Rest of Europe

Asia Pacific

China

India

Japan

Australia

South Korea

Rest of Asia Pacific

Latin America

Brazil

Mexico

Rest of Latin America

Middle East & Africa

Saudi Arabia

South Africa

Rest of the Middle East & Africa

Years Considered for the Study:

Historical Year: 2022

Base Year: 2023

Forecast Period: 2024 to 2032

Key Takeaways:

Market estimates and forecasts for 10 years (2022-2032).

Annualized revenue trends and regional-level analysis for each segment.

Comprehensive geographical analysis, including country-level insights across major regions.

Competitive landscape assessment, covering key market players and emerging disruptors.

Strategic recommendations for businesses to enhance market positioning and maximize growth potential.

Supply and demand analysis, evaluating factors influencing pricing, adoption, and technological advancements.

Detailed assessment of AI-driven satellite communication, next-gen SATCOM networks, and 5G integration in airborne connectivity.

## Contents

### **CHAPTER 1. GLOBAL AIRBORNE SATCOM MARKET EXECUTIVE SUMMARY**

- 1.1. Global Airborne SATCOM Market Size & Forecast (2022-2032)
- 1.2. Regional Summary
- 1.3. Segmental Summary
  - 1.3.1. {By Type}
  - 1.3.2. {By End User}
- 1.4. Key Trends
- 1.5. Recession Impact
- 1.6. Analyst Recommendation & Conclusion

### **CHAPTER 2. GLOBAL AIRBORNE SATCOM MARKET DEFINITION AND RESEARCH ASSUMPTIONS**

- 2.1. Research Objective
- 2.2. Market Definition
- 2.3. Research Assumptions
  - 2.3.1. Inclusion & Exclusion
  - 2.3.2. Limitations
  - 2.3.3. Supply Side Analysis
    - 2.3.3.1. Availability
    - 2.3.3.2. Infrastructure
    - 2.3.3.3. Regulatory Environment
    - 2.3.3.4. Market Competition
    - 2.3.3.5. Economic Viability (Consumer's Perspective)
  - 2.3.4. Demand Side Analysis
    - 2.3.4.1. Regulatory Frameworks
    - 2.3.4.2. Technological Advancements
    - 2.3.4.3. Environmental Considerations
    - 2.3.4.4. Consumer Awareness & Acceptance
- 2.4. Estimation Methodology
- 2.5. Years Considered for the Study
- 2.6. Currency Conversion Rates

### **CHAPTER 3. GLOBAL AIRBORNE SATCOM MARKET DYNAMICS**

- 3.1. Market Drivers

- 3.1.1.?Growing Demand for Uninterrupted Communication and Real-Time Awareness
- 3.1.2.?Rapid Expansion of UAVs in Defense & Commercial Sectors
- 3.1.3.?Rising Investments in Next-Generation Satellite Networks
- 3.2.?Market Challenges
  - 3.2.1.?High Deployment Costs and Cybersecurity Threats
  - 3.2.2.?Spectrum Congestion and Regulatory Complexities
- 3.3.?Market Opportunities
  - 3.3.1.?Software-Defined Radios (SDR) & High-Throughput Satellites (HTS)
  - 3.3.2.?Laser Communication and AI-Driven Data Encryption
  - 3.3.3.?5G Integration for Enhanced Airborne Connectivity

## **CHAPTER 4.?GLOBAL AIRBORNE SATCOM MARKET INDUSTRY ANALYSIS**

- 4.1.?Porter's 5 Force Model
  - 4.1.1.?Bargaining Power of Suppliers
  - 4.1.2.?Bargaining Power of Buyers
  - 4.1.3.?Threat of New Entrants
  - 4.1.4.?Threat of Substitutes
  - 4.1.5.?Competitive Rivalry
  - 4.1.6.?Futuristic Approach to Porter's 5 Force Model
  - 4.1.7.?Porter's 5 Force Impact Analysis
- 4.2.?PESTEL Analysis
  - 4.2.1.?Political
  - 4.2.2.?Economical
  - 4.2.3.?Social
  - 4.2.4.?Technological
  - 4.2.5.?Environmental
  - 4.2.6.?Legal
- 4.3.?Top investment opportunity
- 4.4.?Top winning strategies
- 4.5.?Disruptive Trends
- 4.6.?Industry Expert Perspective
- 4.7.?Analyst Recommendation & Conclusion

## **CHAPTER 5.?GLOBAL AIRBORNE SATCOM MARKET SIZE & FORECASTS BY TYPE 2022-2032**

- 5.1.?Segment Dashboard
- 5.2.?Global Airborne SATCOM Market: {Type} Revenue Trend Analysis, 2022 & 2032



(USD Million/Billion)

5.2.1.?New Installation

5.2.2.?Upgrade

## **CHAPTER 6.?GLOBAL AIRBORNE SATCOM MARKET SIZE & FORECASTS BY END USER 2022-2032**

6.1.?Segment Dashboard

6.2.?Global Airborne SATCOM Market: {End User} Revenue Trend Analysis, 2022 & 2032 (USD Million/Billion)

6.2.1.?Government & Defense

6.2.2.?Commercial

## **CHAPTER 7.?GLOBAL AIRBORNE SATCOM MARKET SIZE & FORECASTS BY REGION 2022-2032**

7.1.?North America Airborne SATCOM Market

7.1.1.?U.S. Airborne SATCOM Market

7.1.1.1.?{Type} breakdown size & forecasts, 2022-2032

7.1.1.2.?{End User} breakdown size & forecasts, 2022-2032

7.1.2.?Canada Airborne SATCOM Market

7.2.?Europe Airborne SATCOM Market

7.2.1.?UK Airborne SATCOM Market

7.2.2.?Germany Airborne SATCOM Market

7.2.3.?France Airborne SATCOM Market

7.2.4.?Spain Airborne SATCOM Market

7.2.5.?Italy Airborne SATCOM Market

7.2.6.?Rest of Europe Airborne SATCOM Market

7.3.?Asia-Pacific Airborne SATCOM Market

7.3.1.?China Airborne SATCOM Market

7.3.2.?India Airborne SATCOM Market

7.3.3.?Japan Airborne SATCOM Market

7.3.4.?Australia Airborne SATCOM Market

7.3.5.?South Korea Airborne SATCOM Market

7.3.6.?Rest of Asia Pacific Airborne SATCOM Market

7.4.?Latin America Airborne SATCOM Market

7.4.1.?Brazil Airborne SATCOM Market

7.4.2.?Mexico Airborne SATCOM Market

7.4.3.?Rest of Latin America Airborne SATCOM Market

## 7.5.?Middle East & Africa Airborne SATCOM Market

### 7.5.1.?Saudi Arabia Airborne SATCOM Market

### 7.5.2.?South Africa Airborne SATCOM Market

### 7.5.3.?Rest of Middle East & Africa Airborne SATCOM Market

## **CHAPTER 8.?COMPETITIVE INTELLIGENCE**

### 8.1.?Key Company SWOT Analysis

#### 8.1.1.?Honeywell International Inc.

#### 8.1.2.?Thales Group

#### 8.1.3.?General Dynamics Corporation

### 8.2.?Top Market Strategies

### 8.3.?Company Profiles

#### 8.3.1.?Honeywell International Inc.

##### 8.3.1.1.?Key Information

##### 8.3.1.2.?Overview

##### 8.3.1.3.?Financial (Subject to Data Availability)

##### 8.3.1.4.?Product Summary

##### 8.3.1.5.?Market Strategies

#### 8.3.2.?Thales Group

#### 8.3.3.?General Dynamics Corporation

#### 8.3.4.?Cobham Limited

#### 8.3.5.?Viasat Inc.

#### 8.3.6.?L3Harris Technologies, Inc.

#### 8.3.7.?Raytheon Technologies Corporation

#### 8.3.8.?Iridium Communications Inc.

#### 8.3.9.?Gilat Satellite Networks Ltd.

#### 8.3.10.?Collins Aerospace (Raytheon Technologies)

#### 8.3.11.?SES S.A.

#### 8.3.12.?Inmarsat Global Limited

#### 8.3.13.?Ball Aerospace & Technologies Corp.

#### 8.3.14.?Hughes Network Systems, LLC

#### 8.3.15.?Northrop Grumman Corporation

## **CHAPTER 9.?RESEARCH PROCESS**

### 9.1.?Research Process

#### 9.1.1.?Data Mining

#### 9.1.2.?Analysis

- 9.1.3. Market Estimation
- 9.1.4. Validation
- 9.1.5. Publishing
- 9.2. Research Attributes

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