

Global Military Non-Steerable Antenna Market Size Study & Forecast, by Platform, Product, Frequency, and Regional Forecasts 2025-2035

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Abstracts

The Global Military Non-Steerable Antenna Market is valued at approximately USD 0.56 billion in 2024 and is anticipated to expand at a compound annual growth rate (CAGR) of 6.90% over the forecast period from 2025 to 2035. These antennas, which lack dynamic beamforming capabilities, remain indispensable due to their structural resilience, cost-efficiency, and broad operational bandwidth. As military modernization efforts escalate worldwide, there is a mounting demand for non-steerable antenna systems that can seamlessly support both traditional and contemporary defense communication systems, from encrypted radio relays to satellite-based situational awareness networks. The market is riding the wave of extensive digitization across defense platforms, growing battlefield connectivity requirements, and increasing demand for deployable communication gear with minimal maintenance needs.

Modern warfare has compelled military forces to reconfigure their communication paradigms, emphasizing real-time information exchange, high survivability systems, and modular architecture. As a result, non-steerable antennas, especially variants like blade, whip, and conformal, have gained prominence across ground vehicles, airborne units, and naval vessels due to their ruggedized builds and electromagnetic compatibility. Moreover, ongoing upgrades in legacy systems and retrofitting of conventional fleets are providing a strong tailwind to aftermarket sales. As frequency agility becomes a key determinant in defense communications, antenna systems capable of operating across HF, VHF, UHF, and multiband spectrums are seeing exponential deployment. OEMs are also leveraging materials science and AI-powered diagnostics to innovate antenna designs that are not only compact and durable but also performance-optimized for bandwidth-constrained or contested environments.

Regionally, North America accounted for the lion's share of the market in 2024, primarily fueled by sustained defense budgets, active engagement in global military operations, and robust defense tech ecosystems in the U.S. and Canada. Europe is witnessing steady growth, led by NATO's defense readiness initiatives and large-scale procurement programs in the UK, Germany, and France. The Asia Pacific region is expected to exhibit the fastest growth rate over the forecast period, underpinned by regional geopolitical tensions, territorial disputes, and rapid expansion of indigenous military manufacturing capabilities in countries like China, India, and South Korea. Additionally, the Middle East and parts of Latin America are increasingly adopting these systems to modernize communication infrastructure and enhance ISR (Intelligence, Surveillance, and Reconnaissance) capabilities across remote and volatile regions.

Major market players included in this report are:

Cobham Limited

L3Harris Technologies Inc.

Comrod Communication AS

Rohde & Schwarz GmbH & Co KG

Raytheon Technologies Corporation

Thales Group

Northrop Grumman Corporation

Collins Aerospace

BAE Systems PLC

Leonardo S.p.A

General Dynamics Corporation

QinetiQ Group PLC

Terma A/S

TCI International, Inc.

Hascall-Denke

Global Military Non-Steerable Antenna Market Report Scope:

Historical Data – 2023, 2024

Base Year for Estimation – 2024

Forecast period – 2025-2035

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

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

Customization Scope – Free report customization (equivalent up to 8 analysts' 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 for the coming years. The report is designed to incorporate both qualitative and quantitative aspects of the industry within the countries involved in the study. The report also provides detailed information about crucial aspects, such as driving factors and challenges, which will define the future growth of the market. Additionally, it incorporates potential opportunities in micro-markets for stakeholders to invest, along with a detailed analysis of the competitive landscape and product offerings of key players. The detailed segments and sub-segments of the market are explained below:

By Platform:

Ground

Airborne

Marine

By Product:

Blade

Patch

Whip

Conformal

Rubber Ducky

Loop

By Frequency:

HF

VHF

UHF

EHF

SHF

Multiband

By Point of Sale:

OEM

Aftermarket

By Application:

(Application-specific use cases can be detailed per project requirements)

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

Middle East & Africa

UAE

Saudi Arabia

South Africa

Rest of Middle East & Africa

Key Takeaways:

Market Estimates & Forecast for 10 years from 2025 to 2035.

Annualized revenues and regional level analysis for each market segment.

Detailed analysis of geographical landscape with Country level analysis of major regions.

Competitive landscape with information on major players in the market.

Analysis of key business strategies and recommendations on future market approach.

Analysis of competitive structure of the market.

Demand side and supply side analysis of the market.

Contents

CHAPTER 1. GLOBAL MILITARY NON-STEERABLE ANTENNA MARKET REPORT SCOPE & METHODOLOGY

- 1.1. Research Objective
- 1.2. Research Methodology
 - 1.2.1. Forecast Model
 - 1.2.2. Desk Research
 - 1.2.3. Top-Down and Bottom-Up Approach
- 1.3. Research Attributes
- 1.4. Scope of the Study
 - 1.4.1. Market Definition
 - 1.4.2. Market Segmentation
- 1.5. Research Assumption
 - 1.5.1. Inclusion & Exclusion
 - 1.5.2. Limitations
 - 1.5.3. Years Considered for the Study

CHAPTER 2. EXECUTIVE SUMMARY

- 2.1. CEO/CXO Standpoint
- 2.2. Strategic Insights
- 2.3. ESG Analysis
- 2.4. Key Findings

CHAPTER 3. GLOBAL MILITARY NON-STEERABLE ANTENNA MARKET FORCES ANALYSIS

- 3.1. Market Forces Shaping the Global Market (2024–2035)
- 3.2. Drivers
 - 3.2.1. Escalating Digitization of Defense Communication Networks
 - 3.2.2. Modernization Imperatives for Legacy Platforms
 - 3.2.3. Demand for Frequency-Agile, Ruggedized Systems
- 3.3. Restraints
 - 3.3.1. Integration Complexity with Existing RF Architectures
 - 3.3.2. High Development and Certification Costs
 - 3.3.3. Signal Degradation in Harsh Environments
- 3.4. Opportunities

- 3.4.1. Aftermarket Retrofits Across Multiple Platforms
- 3.4.2. Expansion into Unmanned and Autonomous Systems
- 3.4.3. Innovations in Advanced Materials and Diagnostics

CHAPTER 4. GLOBAL MILITARY NON-STEERABLE ANTENNA INDUSTRY ANALYSIS

- 4.1. Porter's Five Forces Model
 - 4.1.1. Bargaining Power of Buyer
 - 4.1.2. Bargaining Power of Supplier
 - 4.1.3. Threat of New Entrants
 - 4.1.4. Threat of Substitutes
 - 4.1.5. Competitive Rivalry
- 4.2. Porter's Five Forces Forecast Model (2024–2035)
- 4.3. PESTEL Analysis
 - 4.3.1. Political
 - 4.3.2. Economical
 - 4.3.3. Social
 - 4.3.4. Technological
 - 4.3.5. Environmental
 - 4.3.6. Legal
- 4.4. Top Investment Opportunities
- 4.5. Top Winning Strategies (2025)
- 4.6. Market Share Analysis (2024–2025)
- 4.7. Global Pricing Analysis and Trends 2025
- 4.8. Analyst Recommendation & Conclusion

CHAPTER 5. GLOBAL MILITARY NON-STEERABLE ANTENNA MARKET SIZE & FORECASTS BY PLATFORM (2025–2035)

- 5.1. Market Overview
- 5.2. Ground
 - 5.2.1. Top Countries Breakdown Estimates & Forecasts, 2024–2035
 - 5.2.2. Regional Market Size Analysis, 2025–2035
- 5.3. Airborne
 - 5.3.1. Top Countries Breakdown Estimates & Forecasts, 2024–2035
 - 5.3.2. Regional Market Size Analysis, 2025–2035
- 5.4. Marine
 - 5.4.1. Top Countries Breakdown Estimates & Forecasts, 2024–2035

5.4.2. Regional Market Size Analysis, 2025–2035

CHAPTER 6. GLOBAL MILITARY NON-STEERABLE ANTENNA MARKET SIZE & FORECASTS BY PRODUCT (2025–2035)

6.1. Market Overview

6.2. Blade

6.2.1. Top Countries Breakdown Estimates & Forecasts, 2024–2035

6.2.2. Regional Market Size Analysis, 2025–2035

6.3. Patch

6.3.1. Top Countries Breakdown Estimates & Forecasts, 2024–2035

6.3.2. Regional Market Size Analysis, 2025–2035

6.4. Whip

6.4.1. Top Countries Breakdown Estimates & Forecasts, 2024–2035

6.4.2. Regional Market Size Analysis, 2025–2035

6.5. Conformal

6.5.1. Top Countries Breakdown Estimates & Forecasts, 2024–2035

6.5.2. Regional Market Size Analysis, 2025–2035

6.6. Rubber Ducky

6.6.1. Top Countries Breakdown Estimates & Forecasts, 2024–2035

6.6.2. Regional Market Size Analysis, 2025–2035

6.7. Loop

6.7.1. Top Countries Breakdown Estimates & Forecasts, 2024–2035

6.7.2. Regional Market Size Analysis, 2025–2035

CHAPTER 7. GLOBAL MILITARY NON-STEERABLE ANTENNA MARKET SIZE & FORECASTS BY FREQUENCY (2025–2035)

7.1. Market Overview

7.2. HF

7.2.1. Top Countries Breakdown Estimates & Forecasts, 2024–2035

7.2.2. Regional Market Size Analysis, 2025–2035

7.3. VHF

7.3.1. Top Countries Breakdown Estimates & Forecasts, 2024–2035

7.3.2. Regional Market Size Analysis, 2025–2035

7.4. UHF

7.4.1. Top Countries Breakdown Estimates & Forecasts, 2024–2035

7.4.2. Regional Market Size Analysis, 2025–2035

7.5. EHF

- 7.5.1. Top Countries Breakdown Estimates & Forecasts, 2024–2035
- 7.5.2. Regional Market Size Analysis, 2025–2035
- 7.6. SHF
 - 7.6.1. Top Countries Breakdown Estimates & Forecasts, 2024–2035
 - 7.6.2. Regional Market Size Analysis, 2025–2035
- 7.7. Multiband
 - 7.7.1. Top Countries Breakdown Estimates & Forecasts, 2024–2035
 - 7.7.2. Regional Market Size Analysis, 2025–2035

CHAPTER 8. GLOBAL MILITARY NON-STEERABLE ANTENNA MARKET SIZE & FORECASTS BY POINT OF SALE (2025–2035)

- 8.1. Market Overview
- 8.2. OEM
 - 8.2.1. Top Countries Breakdown Estimates & Forecasts, 2024–2035
 - 8.2.2. Regional Market Size Analysis, 2025–2035
- 8.3. Aftermarket
 - 8.3.1. Top Countries Breakdown Estimates & Forecasts, 2024–2035
 - 8.3.2. Regional Market Size Analysis, 2025–2035

CHAPTER 9. GLOBAL MILITARY NON-STEERABLE ANTENNA MARKET SIZE & FORECASTS BY APPLICATION (2025–2035)

- 9.1. Market Overview
- 9.2. (Application-specific use cases as required)
 - 9.2.1. Top Countries Breakdown Estimates & Forecasts, 2024–2035
 - 9.2.2. Regional Market Size Analysis, 2025–2035

CHAPTER 10. GLOBAL MILITARY NON-STEERABLE ANTENNA MARKET SIZE & FORECASTS BY REGION (2025–2035)

- 10.1. Market, Regional Snapshot
- 10.2. Top Leading & Emerging Countries
- 10.3. North America Market
 - 10.3.1. U.S.
 - 10.3.1.1. Platform Breakdown Size & Forecasts, 2025–2035
 - 10.3.1.2. Product Breakdown Size & Forecasts, 2025–2035
 - 10.3.2. Canada
 - 10.3.2.1. Platform Breakdown Size & Forecasts, 2025–2035

10.3.2.2. Product Breakdown Size & Forecasts, 2025–2035

10.4. Europe Market

10.4.1. UK

10.4.1.1. Frequency Breakdown Size & Forecasts, 2025–2035

10.4.1.2. Point of Sale Breakdown Size & Forecasts, 2025–2035

10.4.2. Germany

10.4.2.1. Frequency Breakdown Size & Forecasts, 2025–2035

10.4.2.2. Point of Sale Breakdown Size & Forecasts, 2025–2035

10.4.3. France

10.4.3.1. Frequency Breakdown Size & Forecasts, 2025–2035

10.4.3.2. Point of Sale Breakdown Size & Forecasts, 2025–2035

10.4.4. Spain

10.4.4.1. Frequency Breakdown Size & Forecasts, 2025–2035

10.4.4.2. Point of Sale Breakdown Size & Forecasts, 2025–2035

10.4.5. Italy

10.4.5.1. Frequency Breakdown Size & Forecasts, 2025–2035

10.4.5.2. Point of Sale Breakdown Size & Forecasts, 2025–2035

10.4.6. Rest of Europe

10.4.6.1. Frequency Breakdown Size & Forecasts, 2025–2035

10.4.6.2. Point of Sale Breakdown Size & Forecasts, 2025–2035

10.5. Asia Pacific Market

10.5.1. China

10.5.1.1. Platform Breakdown Size & Forecasts, 2025–2035

10.5.1.2. Product Breakdown Size & Forecasts, 2025–2035

10.5.2. India

10.5.2.1. Platform Breakdown Size & Forecasts, 2025–2035

10.5.2.2. Product Breakdown Size & Forecasts, 2025–2035

10.5.3. Japan

10.5.3.1. Platform Breakdown Size & Forecasts, 2025–2035

10.5.3.2. Product Breakdown Size & Forecasts, 2025–2035

10.5.4. Australia

10.5.4.1. Frequency Breakdown Size & Forecasts, 2025–2035

10.5.4.2. Point of Sale Breakdown Size & Forecasts, 2025–2035

10.5.5. South Korea

10.5.5.1. Frequency Breakdown Size & Forecasts, 2025–2035

10.5.5.2. Point of Sale Breakdown Size & Forecasts, 2025–2035

10.5.6. Rest of Asia Pacific

10.5.6.1. Frequency Breakdown Size & Forecasts, 2025–2035

10.5.6.2. Point of Sale Breakdown Size & Forecasts, 2025–2035

10.6. Latin America Market

10.6.1. Brazil

10.6.1.1. Platform Breakdown Size & Forecasts, 2025–2035

10.6.1.2. Product Breakdown Size & Forecasts, 2025–2035

10.6.2. Mexico

10.6.2.1. Platform Breakdown Size & Forecasts, 2025–2035

10.6.2.2. Product Breakdown Size & Forecasts, 2025–2035

10.7. Middle East & Africa Market

10.7.1. UAE

10.7.1.1. Frequency Breakdown Size & Forecasts, 2025–2035

10.7.1.2. Point of Sale Breakdown Size & Forecasts, 2025–2035

10.7.2. Saudi Arabia

10.7.2.1. Frequency Breakdown Size & Forecasts, 2025–2035

10.7.2.2. Point of Sale Breakdown Size & Forecasts, 2025–2035

10.7.3. South Africa

10.7.3.1. Frequency Breakdown Size & Forecasts, 2025–2035

10.7.3.2. Point of Sale Breakdown Size & Forecasts, 2025–2035

10.7.4. Rest of Middle East & Africa

10.7.4.1. Frequency Breakdown Size & Forecasts, 2025–2035

10.7.4.2. Point of Sale Breakdown Size & Forecasts, 2025–2035

CHAPTER 11. COMPETITIVE INTELLIGENCE

11.1. Top Market Strategies

11.2. Cobham Limited

11.2.1. Company Overview

11.2.2. Key Executives

11.2.3. Company Snapshot

11.2.4. Financial Performance (Subject to Data Availability)

11.2.5. Product/Services Portfolio

11.2.6. Recent Development

11.2.7. Market Strategies

11.2.8. SWOT Analysis

11.3. L3Harris Technologies Inc.

11.4. Comrod Communication AS

11.5. Rohde & Schwarz GmbH & Co KG

11.6. Raytheon Technologies Corporation

11.7. Thales Group

11.8. Northrop Grumman Corporation

- 11.9. Collins Aerospace
- 11.10. BAE Systems PLC
- 11.11. Leonardo S.p.A
- 11.12. General Dynamics Corporation
- 11.13. QinetiQ Group PLC
- 11.14. Terma A/S
- 11.15. TCI International, Inc.
- 11.16. Hascall-Denke

List Of Tables

LIST OF TABLES

Table 1. Global Military Non-Steerable Antenna Market, Report Scope

Table 2. Global Military Non-Steerable Antenna Market Estimates & Forecasts By Region 2024–2035

Table 3. Global Military Non-Steerable Antenna Market Estimates & Forecasts By Platform 2024–2035

Table 4. Global Military Non-Steerable Antenna Market Estimates & Forecasts By Product 2024–2035

Table 5. Global Military Non-Steerable Antenna Market Estimates & Forecasts By Frequency 2024–2035

Table 6. Global Military Non-Steerable Antenna Market Estimates & Forecasts By Point of Sale 2024–2035

Table 7. Global Military Non-Steerable Antenna Market Estimates & Forecasts By Application 2024–2035

Table 8. U.S. Market Estimates & Forecasts, 2024–2035

Table 9. Canada Market Estimates & Forecasts, 2024–2035

Table 10. UK Market Estimates & Forecasts, 2024–2035

Table 11. Germany Market Estimates & Forecasts, 2024–2035

Table 12. France Market Estimates & Forecasts, 2024–2035

Table 13. Spain Market Estimates & Forecasts, 2024–2035

Table 14. Italy Market Estimates & Forecasts, 2024–2035

Table 15. Rest of Europe Market Estimates & Forecasts, 2024–2035

Table 16. China Market Estimates & Forecasts, 2024–2035

Table 17. India Market Estimates & Forecasts, 2024–2035

Table 18. Japan Market Estimates & Forecasts, 2024–2035

Table 19. Australia Market Estimates & Forecasts, 2024–2035

Table 20. South Korea Market Estimates & Forecasts, 2024–2035

List Of Figures

LIST OF FIGURES

- Fig 1. Global Military Non-Steerable Antenna Market, Research Methodology
- Fig 2. Global Military Non-Steerable Antenna Market, Market Estimation Techniques
- Fig 3. Global Military Non-Steerable Antenna Market, Forecast Methods
- Fig 4. Global Military Non-Steerable Antenna Market, Key Trends 2025
- Fig 5. Global Military Non-Steerable Antenna Market, Growth Prospects 2024–2035
- Fig 6. Global Military Non-Steerable Antenna Market, Porter’s Five Forces Model
- Fig 7. Global Military Non-Steerable Antenna Market, PESTEL Analysis
- Fig 8. Global Military Non-Steerable Antenna Market, Value Chain Analysis
- Fig 9. Market Size by Platform, 2025 & 2035
- Fig 10. Market Size by Product, 2025 & 2035
- Fig 11. Market Size by Frequency, 2025 & 2035
- Fig 12. Market Size by Point of Sale, 2025 & 2035
- Fig 13. North America Market, 2025 & 2035
- Fig 14. Europe Market, 2025 & 2035
- Fig 15. Asia Pacific Market, 2025 & 2035
- Fig 16. Latin America Market, 2025 & 2035
- Fig 17. Middle East & Africa Market, 2025 & 2035
- Fig 18. Global Market Share Analysis (2025)
- Fig 19. Technology Adoption Curve, 2024–2035
- Fig 20. Regional Investment Distribution, 2024–2035

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