

# Global Aircraft Transponders Supply, Demand and Key Producers, 2026-2032

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## Abstracts

The global Aircraft Transponders market size is expected to reach \$ 710 million by 2032, rising at a market growth of 4.1% CAGR during the forecast period (2026-2032).

An aircraft transponder is an onboard surveillance device installed on an aircraft that automatically transmits coded replies when interrogated by ground-based secondary surveillance radar (SSR) or airborne collision avoidance systems. The transmitted data typically includes a squawk code, altitude information, and other flight-related parameters to support air traffic control (ATC) surveillance and traffic collision avoidance systems (TCAS). Aircraft transponders are essential components of modern air traffic management across commercial, general, military, and unmanned aviation sectors.

Global aircraft transponder production is projected to reach 187,000 units by 2025, with an average price of \$2,800 per unit.

From an industry chain perspective, upstream includes RF and microwave semiconductor suppliers, power amplifier and low-noise amplifier manufacturers, FPGA/ASIC design companies, RF front-end component suppliers (filters and duplexers), high-reliability PCB material vendors, as well as aviation-grade electronic component providers and third-party certification agencies. Aircraft transponders typically operate in the 1030/1090 MHz frequency bands and are based on mature RF and mixed-signal architectures, with limited dependence on advanced semiconductor nodes. However, they require highly stable RF power transmission, precise frequency control, strong electromagnetic interference resistance, and robust environmental reliability (temperature, vibration, and shock). Core technical barriers lie in high-reliability transmission chain design, compatibility with Mode A/C/S protocols, seamless interaction with air traffic management systems, and compliance with aviation

certification standards such as DO-178 and DO-254.

Downstream applications are mainly concentrated in commercial aviation, general aviation, business jets, military aviation, and certain large unmanned aerial vehicle platforms. Aircraft transponders are fundamental components of air traffic surveillance systems, enabling communication with secondary surveillance radar (SSR), traffic collision avoidance systems (TCAS), and ADS-B networks. Installation is essentially mandatory in commercial transport aircraft. In general aviation, penetration continues to increase due to stricter airspace regulations and ADS-B Out mandates. Military applications emphasize encrypted modes and anti-jamming capabilities. Overall, the market size is relatively stable but highly correlated with global aircraft deliveries, fleet size, and aviation industry cycles. Market concentration remains high, dominated by a limited number of globally certified avionics suppliers.

Industry trends include deeper integration with ADS-B Out/In functions, adoption of software-defined radio architectures, miniaturization and weight reduction, and enhanced data link security. With the advancement of global airspace digitalization initiatives such as NextGen in the United States and SESAR in Europe, demand for high-accuracy, traceable, and high-integrity surveillance data continues to grow. Key growth drivers include expansion of the global civil aircraft fleet, increasing retrofit demand for legacy aircraft, and tightening regulatory requirements. Major constraints include pronounced cyclicity in the aviation sector, lengthy and costly certification processes, and substitution or pricing pressure from increasingly integrated avionics platforms.

In terms of profitability, aircraft transponders belong to the specialized avionics segment with high technical and certification barriers. Civil aviation-grade products typically achieve gross margins of 35% to 50%, while integrated ADS-B and high-power models may reach 45% to 60%. Military or highly customized variants may exceed 50%. The overall industry weighted average gross margin is approximately 40% to 55%, with profitability strongly influenced by customer structure (OEM vs. retrofit), product complexity, and certification level.

This report studies the global Aircraft Transponders production, demand, key manufacturers, and key regions.

This report is a detailed and comprehensive analysis of the world market for Aircraft Transponders and provides market size (US\$ million) and Year-over-Year (YoY) Growth, considering 2025 as the base year. This report explores demand trends and

competition, as well as details the characteristics of Aircraft Transponders that contribute to its increasing demand across many markets.

### **Highlights and key features of the study**

Global Aircraft Transponders total production and demand, 2021-2032, (Units)

Global Aircraft Transponders total production value, 2021-2032, (USD Million)

Global Aircraft Transponders production by region & country, production, value, CAGR, 2021-2032, (USD Million) & (Units), (based on production site)

Global Aircraft Transponders consumption by region & country, CAGR, 2021-2032 & (Units)

U.S. VS China: Aircraft Transponders domestic production, consumption, key domestic manufacturers and share

Global Aircraft Transponders production by manufacturer, production, price, value and market share 2021-2026, (USD Million) & (Units)

Global Aircraft Transponders production by Type, production, value, CAGR, 2021-2032, (USD Million) & (Units)

Global Aircraft Transponders production by Application, production, value, CAGR, 2021-2032, (USD Million) & (Units)

This report profiles key players in the global Aircraft Transponders market based on the following parameters - company overview, production, value, price, gross margin, product portfolio, geographical presence, and key developments. Key companies covered as a part of this study include RTX, Thales, Honeywell, L3Harris, Acron Aviation, Garmin, BendixKing, Avidyne, Becker Avionics, Trig Avionics, etc.

This report also provides key insights about market drivers, restraints, opportunities, new product launches or approvals.

Stakeholders would have ease in decision-making through various strategy matrices used in analyzing the World Aircraft Transponders market

### **Detailed Segmentation:**

Each section contains quantitative market data including market by value (US\$ Millions), volume (production, consumption) & (Units) and average price (US\$/Unit) by manufacturer, by Type, and by Application. Data is given for the years 2021-2032 by year with 2025 as the base year, 2026 as the estimate year, and 2027-2032 as the forecast year.

### Global Aircraft Transponders Market, By Region:

United States

China

Europe

Japan

South Korea

ASEAN

India

Rest of World

### Global Aircraft Transponders Market, Segmentation by Type:

Mode A Transponder

Mode C Transponder

Mode S Transponder

Hybrid Mode Transponder

### Global Aircraft Transponders Market, Segmentation by Function:

Basic Identification Type

Altitude-Encoding Type

ADS-B Out Capable Type

ADS-B In/Out Capable Type

### Global Aircraft Transponders Market, Segmentation by Structure:

Rack-Mounted Type

Panel-Mounted Type

Integrated Avionics Type

### Global Aircraft Transponders Market, Segmentation by Application:

Commercial Transport Aircraft

General Aviation Aircraft

Military Aircraft

Unmanned Aerial Vehicles (UAVs)

### Companies Profiled:

RTX

Thales

Honeywell

L3Harris

Acron Aviation

Garmin

BendixKing

Avidyne

Becker Avionics

Trig Avionics

Appareo

FreeFlight Systems

Dynon Avionics

uAvionix

Sagetech Avionics

TQ

Microair Avionics

Sandia Aerospace

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Air Avionics

### **Key Questions Answered:**

1. How big is the global Aircraft Transponders market?
2. What is the demand of the global Aircraft Transponders market?
3. What is the year over year growth of the global Aircraft Transponders market?
4. What is the production and production value of the global Aircraft Transponders market?
5. Who are the key producers in the global Aircraft Transponders market?
6. What are the growth factors driving the market demand?

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