

Global Mode S Transponders Supply, Demand and Key Producers, 2026-2032

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Abstracts

The global Mode S Transponders market size is expected to reach \$ 604 million by 2032, rising at a market growth of 3.4% CAGR during the forecast period (2026-2032).

A Mode S transponder is an aircraft-mounted secondary surveillance radar (SSR) responder that transmits coded replies containing a unique aircraft identification and flight-related data when interrogated by ground air traffic control radar or airborne collision avoidance systems. Compared with traditional Mode A/C transponders, Mode S transponders support selective addressing, unique aircraft identification, and bidirectional data link communication with higher data capacity. They are a critical component of modern air traffic management systems.

In 2025, the global production of Mode S transponders is estimated at 179,000 units, with an average price of US\$2,600 per unit.

From an industry chain perspective, upstream includes RF and microwave chip suppliers, power amplifier and low-noise amplifier module manufacturers, FPGA/ASIC design service providers, RF front-end component suppliers (filters and duplexers), high-frequency PCB material vendors, as well as aviation-grade electronic component and certification service providers. Mode S transponders are typically based on mature RF and mixed-signal architectures, with limited reliance on leading-edge semiconductor nodes. However, they require strong capabilities in high-reliability RF design, signal integrity, electromagnetic interference suppression, and compliance with aviation certification standards such as DO-178 and DO-254. Core technical barriers lie in stable transmission and reception at 1090 MHz, full compatibility with Mode A/C/S protocols, and seamless integration with TCAS and ADS-B systems.

Downstream applications are primarily concentrated in civil aviation, general aviation, business jets, military aviation, and selected unmanned aerial vehicle platforms. Mode S transponders are critical components in modern air traffic management systems, enabling interaction with secondary surveillance radar (SSR) and TCAS. In commercial airliners, they are essentially mandatory equipment. In general aviation, penetration continues to rise due to stricter airspace regulation and widespread ADS-B Out mandates. Military applications emphasize encrypted modes and anti-jamming capabilities. Overall, the downstream market is relatively stable but closely tied to aircraft delivery cycles and overall aviation industry conditions. Market concentration is high, dominated by a limited number of certified avionics suppliers.

Industry trends include deeper integration with ADS-B Out/In functions, miniaturization and weight reduction, adoption of software-defined radio architectures, and enhanced data link reliability. With the advancement of global airspace digitalization initiatives such as NextGen and SESAR, demand for high-integrity and traceable 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 cyclical fluctuations in the aviation industry, lengthy certification cycles, high R&D and testing costs, and substitution pressure from highly integrated avionics platforms.

In terms of profitability, Mode S 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 high-end integrated models with ADS-B and TCAS interfaces may reach 45% to 60%. Military or customized variants can 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 Mode S Transponders production, demand, key manufacturers, and key regions.

This report is a detailed and comprehensive analysis of the world market for Mode S 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 Mode S Transponders that contribute to its increasing demand across many markets.

Highlights and key features of the study

Global Mode S Transponders total production and demand, 2021-2032, (Units)
Global Mode S Transponders total production value, 2021-2032, (USD Million)
Global Mode S Transponders production by region & country, production, value, CAGR, 2021-2032, (USD Million) & (Units), (based on production site)
Global Mode S Transponders consumption by region & country, CAGR, 2021-2032 & (Units)
U.S. VS China: Mode S Transponders domestic production, consumption, key domestic manufacturers and share
Global Mode S Transponders production by manufacturer, production, price, value and market share 2021-2026, (USD Million) & (Units)
Global Mode S Transponders production by Type, production, value, CAGR, 2021-2032, (USD Million) & (Units)
Global Mode S Transponders production by Application, production, value, CAGR, 2021-2032, (USD Million) & (Units)

This report profiles key players in the global Mode S 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, L3Harris, Garmin, Avidyne, Trig Avionics, Becker Avionics, Appareo, uAvionix, Sagetech 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 Mode S 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 Mode S Transponders Market, By Region:

United States

China

Europe

Japan

South Korea

ASEAN

India

Rest of World

Global Mode S Transponders Market, Segmentation by Type:

Basic Mode S Transponder

Enhanced Mode S (Extended Squitter)

Mode S With ADS-B Out

Mode S With ADS-B In/Out

Global Mode S Transponders Market, Segmentation by Power Rating:

Low Power Type

Standard Power Type

High Power Long-Range Type

Global Mode S Transponders Market, Segmentation by Integration Method:

Standalone Transponder Unit

Integrated With Altitude Encoder

Integrated With Avionics System

Integrated Communication Navigation Surveillance System

Global Mode S Transponders Market, Segmentation by Application:

Commercial Passenger And Cargo Aircraft

General Aviation

Military Aviation Platforms

UAV Airspace Management

Companies Profiled:

RTX

Thales

L3Harris

Garmin

Avidyne

Trig Avionics

Becker Avionics

Appareo

uAvionix

Sagetech Avionics

Dynon Avionics

f.u.n.k.e. AVIONICS

Key Questions Answered:

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

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