

Global Aircraft Transponders Market Growth 2026-2032

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Abstracts

The global Aircraft Transponders market size is predicted to grow from US\$ 512 million in 2025 to US\$ 685 million in 2032; it is expected to grow at a CAGR of 4.4% from 2026 to 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 cyclicalities 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.

LP Information, Inc. (LPI)'s newest research report, the "Aircraft Transponders Industry Forecast" looks at past sales and reviews total world Aircraft Transponders sales in 2025, providing a comprehensive analysis by region and market sector of projected Aircraft Transponders sales for 2026 through 2032. With Aircraft Transponders sales

broken down by region, market sector and sub-sector, this report provides a detailed analysis in US\$ millions of the world Aircraft Transponders industry.

This Insight Report provides a comprehensive analysis of the global Aircraft Transponders landscape and highlights key trends related to product segmentation, company formation, revenue, and market share, latest development, and M&A activity. This report also analyzes the strategies of leading global companies with a focus on Aircraft Transponders portfolios and capabilities, market entry strategies, market positions, and geographic footprints, to better understand these firms' unique position in an accelerating global Aircraft Transponders market.

This Insight Report evaluates the key market trends, drivers, and affecting factors shaping the global outlook for Aircraft Transponders and breaks down the forecast by Type, by Application, geography, and market size to highlight emerging pockets of opportunity. With a transparent methodology based on hundreds of bottom-up qualitative and quantitative market inputs, this study forecast offers a highly nuanced view of the current state and future trajectory in the global Aircraft Transponders.

This report presents a comprehensive overview, market shares, and growth opportunities of Aircraft Transponders market by product type, application, key manufacturers and key regions and countries.

Segmentation by Type:

Mode A Transponder

Mode C Transponder

Mode S Transponder

Hybrid Mode Transponder

Segmentation by Function:

Basic Identification Type

Altitude-Encoding Type

ADS-B Out Capable Type

ADS-B In/Out Capable Type

Segmentation by Structure:

Rack-Mounted Type

Panel-Mounted Type

Integrated Avionics Type

Segmentation by Application:

Commercial Transport Aircraft

General Aviation Aircraft

Military Aircraft

Unmanned Aerial Vehicles (UAVs)

This report also splits the market by region:

Americas

United States

Canada

Mexico

Brazil

APAC

China

Japan

Korea

Southeast Asia

India

Australia

Europe

Germany

France

UK

Italy

Russia

Middle East & Africa

Egypt

South Africa

Israel

Turkey

GCC Countries

The below companies that are profiled have been selected based on inputs gathered from primary experts and analysing the company's coverage, product portfolio, its

market penetration.

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 Addressed in this Report

What is the 10-year outlook for the global Aircraft Transponders market?

What factors are driving Aircraft Transponders market growth, globally and by region?

Which technologies are poised for the fastest growth by market and region?

How do Aircraft Transponders market opportunities vary by end market size?

How does Aircraft Transponders break out by Type, by Application?

Contents

1 SCOPE OF THE REPORT

- 1.1 Market Introduction
- 1.2 Years Considered
- 1.3 Research Objectives
- 1.4 Market Research Methodology
- 1.5 Research Process and Data Source
- 1.6 Economic Indicators
- 1.7 Currency Considered
- 1.8 Market Estimation Caveats

2 EXECUTIVE SUMMARY

- 2.1 World Market Overview
 - 2.1.1 Global Aircraft Transponders Annual Sales 2021-2032
 - 2.1.2 World Current & Future Analysis for Aircraft Transponders by Geographic Region, 2021, 2025 & 2032
 - 2.1.3 World Current & Future Analysis for Aircraft Transponders by Country/Region, 2021, 2025 & 2032
- 2.2 Aircraft Transponders Segment by Type
 - 2.2.1 Mode A Transponder
 - 2.2.2 Mode C Transponder
 - 2.2.3 Mode S Transponder
 - 2.2.4 Hybrid Mode Transponder
 - 2.2.5 Aircraft Transponders Sales by Type
 - 2.2.5.1 Global Aircraft Transponders Sales Market Share by Type (2021-2026)
 - 2.2.5.2 Global Aircraft Transponders Revenue and Market Share by Type (2021-2026)
 - 2.2.5.3 Global Aircraft Transponders Sale Price by Type (2021-2026)
- 2.3 Aircraft Transponders Segment by Function
 - 2.3.1 Basic Identification Type
 - 2.3.2 Altitude-Encoding Type
 - 2.3.3 ADS-B Out Capable Type
 - 2.3.4 ADS-B In/Out Capable Type
 - 2.3.5 Aircraft Transponders Sales by Function
 - 2.3.5.1 Global Aircraft Transponders Sales Market Share by Function (2021-2026)
 - 2.3.5.2 Global Aircraft Transponders Revenue and Market Share by Function

(2021-2026)

2.3.5.3 Global Aircraft Transponders Sale Price by Function (2021-2026)

2.4 Aircraft Transponders Segment by Structure

2.4.1 Rack-Mounted Type

2.4.2 Panel-Mounted Type

2.4.3 Integrated Avionics Type

2.4.4 Aircraft Transponders Sales by Structure

2.4.4.1 Global Aircraft Transponders Sales Market Share by Structure (2021-2026)

2.4.4.2 Global Aircraft Transponders Revenue and Market Share by Structure

(2021-2026)

2.4.4.3 Global Aircraft Transponders Sale Price by Structure (2021-2026)

2.5 Aircraft Transponders Segment by Application

2.5.1 Commercial Transport Aircraft

2.5.2 General Aviation Aircraft

2.5.3 Military Aircraft

2.5.4 Unmanned Aerial Vehicles (UAVs)

2.5.5 Aircraft Transponders Sales by Application

2.5.5.1 Global Aircraft Transponders Sale Market Share by Application (2021-2026)

2.5.5.2 Global Aircraft Transponders Revenue and Market Share by Application

(2021-2026)

2.5.5.3 Global Aircraft Transponders Sale Price by Application (2021-2026)

3 GLOBAL BY COMPANY

3.1 Global Aircraft Transponders Breakdown Data by Company

3.1.1 Global Aircraft Transponders Annual Sales by Company (2021-2026)

3.1.2 Global Aircraft Transponders Sales Market Share by Company (2021-2026)

3.2 Global Aircraft Transponders Annual Revenue by Company (2021-2026)

3.2.1 Global Aircraft Transponders Revenue by Company (2021-2026)

3.2.2 Global Aircraft Transponders Revenue Market Share by Company (2021-2026)

3.3 Global Aircraft Transponders Sale Price by Company

3.4 Key Manufacturers Aircraft Transponders Producing Area Distribution, Sales Area, Product Type

3.4.1 Key Manufacturers Aircraft Transponders Product Location Distribution

3.4.2 Players Aircraft Transponders Products Offered

3.5 Market Concentration Rate Analysis

3.5.1 Competition Landscape Analysis

3.5.2 Concentration Ratio (CR3, CR5 and CR10) & (2024-2026)

3.6 New Products and Potential Entrants

3.7 Market M&A Activity & Strategy

4 WORLD HISTORIC REVIEW FOR AIRCRAFT TRANSPONDERS BY GEOGRAPHIC REGION

4.1 World Historic Aircraft Transponders Market Size by Geographic Region (2021-2026)

4.1.1 Global Aircraft Transponders Annual Sales by Geographic Region (2021-2026)

4.1.2 Global Aircraft Transponders Annual Revenue by Geographic Region (2021-2026)

4.2 World Historic Aircraft Transponders Market Size by Country/Region (2021-2026)

4.2.1 Global Aircraft Transponders Annual Sales by Country/Region (2021-2026)

4.2.2 Global Aircraft Transponders Annual Revenue by Country/Region (2021-2026)

4.3 Americas Aircraft Transponders Sales Growth

4.4 APAC Aircraft Transponders Sales Growth

4.5 Europe Aircraft Transponders Sales Growth

4.6 Middle East & Africa Aircraft Transponders Sales Growth

5 AMERICAS

5.1 Americas Aircraft Transponders Sales by Country

5.1.1 Americas Aircraft Transponders Sales by Country (2021-2026)

5.1.2 Americas Aircraft Transponders Revenue by Country (2021-2026)

5.2 Americas Aircraft Transponders Sales by Type (2021-2026)

5.3 Americas Aircraft Transponders Sales by Application (2021-2026)

5.4 United States

5.5 Canada

5.6 Mexico

5.7 Brazil

6 APAC

6.1 APAC Aircraft Transponders Sales by Region

6.1.1 APAC Aircraft Transponders Sales by Region (2021-2026)

6.1.2 APAC Aircraft Transponders Revenue by Region (2021-2026)

6.2 APAC Aircraft Transponders Sales by Type (2021-2026)

6.3 APAC Aircraft Transponders Sales by Application (2021-2026)

6.4 China

6.5 Japan

- 6.6 South Korea
- 6.7 Southeast Asia
- 6.8 India
- 6.9 Australia
- 6.10 China Taiwan

7 EUROPE

- 7.1 Europe Aircraft Transponders by Country
 - 7.1.1 Europe Aircraft Transponders Sales by Country (2021-2026)
 - 7.1.2 Europe Aircraft Transponders Revenue by Country (2021-2026)
- 7.2 Europe Aircraft Transponders Sales by Type (2021-2026)
- 7.3 Europe Aircraft Transponders Sales by Application (2021-2026)
- 7.4 Germany
- 7.5 France
- 7.6 UK
- 7.7 Italy
- 7.8 Russia

8 MIDDLE EAST & AFRICA

- 8.1 Middle East & Africa Aircraft Transponders by Country
 - 8.1.1 Middle East & Africa Aircraft Transponders Sales by Country (2021-2026)
 - 8.1.2 Middle East & Africa Aircraft Transponders Revenue by Country (2021-2026)
- 8.2 Middle East & Africa Aircraft Transponders Sales by Type (2021-2026)
- 8.3 Middle East & Africa Aircraft Transponders Sales by Application (2021-2026)
- 8.4 Egypt
- 8.5 South Africa
- 8.6 Israel
- 8.7 Turkey
- 8.8 GCC Countries

9 MARKET DRIVERS, CHALLENGES AND TRENDS

- 9.1 Market Drivers & Growth Opportunities
- 9.2 Market Challenges & Risks
- 9.3 Industry Trends

10 MANUFACTURING COST STRUCTURE ANALYSIS

- 10.1 Raw Material and Suppliers
- 10.2 Manufacturing Cost Structure Analysis of Aircraft Transponders
- 10.3 Manufacturing Process Analysis of Aircraft Transponders
- 10.4 Industry Chain Structure of Aircraft Transponders

11 MARKETING, DISTRIBUTORS AND CUSTOMER

- 11.1 Sales Channel
 - 11.1.1 Direct Channels
 - 11.1.2 Indirect Channels
- 11.2 Aircraft Transponders Distributors
- 11.3 Aircraft Transponders Customer

12 WORLD FORECAST REVIEW FOR AIRCRAFT TRANSPONDERS BY GEOGRAPHIC REGION

- 12.1 Global Aircraft Transponders Market Size Forecast by Region
 - 12.1.1 Global Aircraft Transponders Forecast by Region (2027-2032)
 - 12.1.2 Global Aircraft Transponders Annual Revenue Forecast by Region (2027-2032)
- 12.2 Americas Forecast by Country (2027-2032)
- 12.3 APAC Forecast by Region (2027-2032)
- 12.4 Europe Forecast by Country (2027-2032)
- 12.5 Middle East & Africa Forecast by Country (2027-2032)
- 12.6 Global Aircraft Transponders Forecast by Type (2027-2032)
- 12.7 Global Aircraft Transponders Forecast by Application (2027-2032)

13 KEY PLAYERS ANALYSIS

- 13.1 RTX
 - 13.1.1 RTX Company Information
 - 13.1.2 RTX Aircraft Transponders Product Portfolios and Specifications
 - 13.1.3 RTX Aircraft Transponders Sales, Revenue, Price and Gross Margin (2021-2026)
 - 13.1.4 RTX Main Business Overview
 - 13.1.5 RTX Latest Developments
- 13.2 Thales
 - 13.2.1 Thales Company Information
 - 13.2.2 Thales Aircraft Transponders Product Portfolios and Specifications

13.2.3 Thales Aircraft Transponders Sales, Revenue, Price and Gross Margin
(2021-2026)

13.2.4 Thales Main Business Overview

13.2.5 Thales Latest Developments

13.3 Honeywell

13.3.1 Honeywell Company Information

13.3.2 Honeywell Aircraft Transponders Product Portfolios and Specifications

13.3.3 Honeywell Aircraft Transponders Sales, Revenue, Price and Gross Margin
(2021-2026)

13.3.4 Honeywell Main Business Overview

13.3.5 Honeywell Latest Developments

13.4 L3Harris

13.4.1 L3Harris Company Information

13.4.2 L3Harris Aircraft Transponders Product Portfolios and Specifications

13.4.3 L3Harris Aircraft Transponders Sales, Revenue, Price and Gross Margin
(2021-2026)

13.4.4 L3Harris Main Business Overview

13.4.5 L3Harris Latest Developments

13.5 Acron Aviation

13.5.1 Acron Aviation Company Information

13.5.2 Acron Aviation Aircraft Transponders Product Portfolios and Specifications

13.5.3 Acron Aviation Aircraft Transponders Sales, Revenue, Price and Gross Margin
(2021-2026)

13.5.4 Acron Aviation Main Business Overview

13.5.5 Acron Aviation Latest Developments

13.6 Garmin

13.6.1 Garmin Company Information

13.6.2 Garmin Aircraft Transponders Product Portfolios and Specifications

13.6.3 Garmin Aircraft Transponders Sales, Revenue, Price and Gross Margin
(2021-2026)

13.6.4 Garmin Main Business Overview

13.6.5 Garmin Latest Developments

13.7 BendixKing

13.7.1 BendixKing Company Information

13.7.2 BendixKing Aircraft Transponders Product Portfolios and Specifications

13.7.3 BendixKing Aircraft Transponders Sales, Revenue, Price and Gross Margin
(2021-2026)

13.7.4 BendixKing Main Business Overview

13.7.5 BendixKing Latest Developments

13.8 Avidyne

13.8.1 Avidyne Company Information

13.8.2 Avidyne Aircraft Transponders Product Portfolios and Specifications

13.8.3 Avidyne Aircraft Transponders Sales, Revenue, Price and Gross Margin (2021-2026)

13.8.4 Avidyne Main Business Overview

13.8.5 Avidyne Latest Developments

13.9 Becker Avionics

13.9.1 Becker Avionics Company Information

13.9.2 Becker Avionics Aircraft Transponders Product Portfolios and Specifications

13.9.3 Becker Avionics Aircraft Transponders Sales, Revenue, Price and Gross Margin (2021-2026)

13.9.4 Becker Avionics Main Business Overview

13.9.5 Becker Avionics Latest Developments

13.10 Trig Avionics

13.10.1 Trig Avionics Company Information

13.10.2 Trig Avionics Aircraft Transponders Product Portfolios and Specifications

13.10.3 Trig Avionics Aircraft Transponders Sales, Revenue, Price and Gross Margin (2021-2026)

13.10.4 Trig Avionics Main Business Overview

13.10.5 Trig Avionics Latest Developments

13.11 Appareo

13.11.1 Appareo Company Information

13.11.2 Appareo Aircraft Transponders Product Portfolios and Specifications

13.11.3 Appareo Aircraft Transponders Sales, Revenue, Price and Gross Margin (2021-2026)

13.11.4 Appareo Main Business Overview

13.11.5 Appareo Latest Developments

13.12 FreeFlight Systems

13.12.1 FreeFlight Systems Company Information

13.12.2 FreeFlight Systems Aircraft Transponders Product Portfolios and Specifications

13.12.3 FreeFlight Systems Aircraft Transponders Sales, Revenue, Price and Gross Margin (2021-2026)

13.12.4 FreeFlight Systems Main Business Overview

13.12.5 FreeFlight Systems Latest Developments

13.13 Dynon Avionics

13.13.1 Dynon Avionics Company Information

13.13.2 Dynon Avionics Aircraft Transponders Product Portfolios and Specifications

13.13.3 Dynon Avionics Aircraft Transponders Sales, Revenue, Price and Gross Margin (2021-2026)

13.13.4 Dynon Avionics Main Business Overview

13.13.5 Dynon Avionics Latest Developments

13.14 uAvionix

13.14.1 uAvionix Company Information

13.14.2 uAvionix Aircraft Transponders Product Portfolios and Specifications

13.14.3 uAvionix Aircraft Transponders Sales, Revenue, Price and Gross Margin (2021-2026)

13.14.4 uAvionix Main Business Overview

13.14.5 uAvionix Latest Developments

13.15 Sagetech Avionics

13.15.1 Sagetech Avionics Company Information

13.15.2 Sagetech Avionics Aircraft Transponders Product Portfolios and Specifications

13.15.3 Sagetech Avionics Aircraft Transponders Sales, Revenue, Price and Gross Margin (2021-2026)

13.15.4 Sagetech Avionics Main Business Overview

13.15.5 Sagetech Avionics Latest Developments

13.16 TQ

13.16.1 TQ Company Information

13.16.2 TQ Aircraft Transponders Product Portfolios and Specifications

13.16.3 TQ Aircraft Transponders Sales, Revenue, Price and Gross Margin (2021-2026)

13.16.4 TQ Main Business Overview

13.16.5 TQ Latest Developments

13.17 Microair Avionics

13.17.1 Microair Avionics Company Information

13.17.2 Microair Avionics Aircraft Transponders Product Portfolios and Specifications

13.17.3 Microair Avionics Aircraft Transponders Sales, Revenue, Price and Gross Margin (2021-2026)

13.17.4 Microair Avionics Main Business Overview

13.17.5 Microair Avionics Latest Developments

13.18 Sandia Aerospace

13.18.1 Sandia Aerospace Company Information

13.18.2 Sandia Aerospace Aircraft Transponders Product Portfolios and Specifications

13.18.3 Sandia Aerospace Aircraft Transponders Sales, Revenue, Price and Gross Margin (2021-2026)

13.18.4 Sandia Aerospace Main Business Overview

13.18.5 Sandia Aerospace Latest Developments

13.19 f.u.n.k.e. AVIONICS

13.19.1 f.u.n.k.e. AVIONICS Company Information

13.19.2 f.u.n.k.e. AVIONICS Aircraft Transponders Product Portfolios and Specifications

13.19.3 f.u.n.k.e. AVIONICS Aircraft Transponders Sales, Revenue, Price and Gross Margin (2021-2026)

13.19.4 f.u.n.k.e. AVIONICS Main Business Overview

13.19.5 f.u.n.k.e. AVIONICS Latest Developments

13.20 Air Avionics

13.20.1 Air Avionics Company Information

13.20.2 Air Avionics Aircraft Transponders Product Portfolios and Specifications

13.20.3 Air Avionics Aircraft Transponders Sales, Revenue, Price and Gross Margin (2021-2026)

13.20.4 Air Avionics Main Business Overview

13.20.5 Air Avionics Latest Developments

14 RESEARCH FINDINGS AND CONCLUSION

List Of Tables

LIST OF TABLES

- Table 1. Aircraft Transponders Annual Sales CAGR by Geographic Region (2021, 2025 & 2032) & (\$ millions)
- Table 2. Aircraft Transponders Annual Sales CAGR by Country/Region (2021, 2025 & 2032) & (\$ millions)
- Table 3. Major Players of Mode A Transponder
- Table 4. Major Players of Mode C Transponder
- Table 5. Major Players of Mode S Transponder
- Table 6. Major Players of Hybrid Mode Transponder
- Table 7. Global Aircraft Transponders Sales by Type (2021-2026) & (Units)
- Table 8. Global Aircraft Transponders Sales Market Share by Type (2021-2026)
- Table 9. Global Aircraft Transponders Revenue by Type (2021-2026) & (\$ million)
- Table 10. Global Aircraft Transponders Revenue Market Share by Type (2021-2026)
- Table 11. Global Aircraft Transponders Sale Price by Type (2021-2026) & (US\$/Unit)
- Table 12. Major Players of Basic Identification Type
- Table 13. Major Players of Altitude-Encoding Type
- Table 14. Major Players of ADS-B Out Capable Type
- Table 15. Major Players of ADS-B In/Out Capable Type
- Table 16. Global Aircraft Transponders Sales by Function (2021-2026) & (Units)
- Table 17. Global Aircraft Transponders Sales Market Share by Function (2021-2026)
- Table 18. Global Aircraft Transponders Revenue by Function (2021-2026) & (\$ million)
- Table 19. Global Aircraft Transponders Revenue Market Share by Function (2021-2026)
- Table 20. Global Aircraft Transponders Sale Price by Function (2021-2026) & (US\$/Unit)
- Table 21. Major Players of Rack-Mounted Type
- Table 22. Major Players of Panel-Mounted Type
- Table 23. Major Players of Integrated Avionics Type
- Table 24. Global Aircraft Transponders Sales by Structure (2021-2026) & (Units)
- Table 25. Global Aircraft Transponders Sales Market Share by Structure (2021-2026)
- Table 26. Global Aircraft Transponders Revenue by Structure (2021-2026) & (\$ million)
- Table 27. Global Aircraft Transponders Revenue Market Share by Structure (2021-2026)
- Table 28. Global Aircraft Transponders Sale Price by Structure (2021-2026) & (US\$/Unit)
- Table 29. Global Aircraft Transponders Sale by Application (2021-2026) & (Units)
- Table 30. Global Aircraft Transponders Sale Market Share by Application (2021-2026)

Table 31. Global Aircraft Transponders Revenue by Application (2021-2026) & (\$ million)

Table 32. Global Aircraft Transponders Revenue Market Share by Application (2021-2026)

Table 33. Global Aircraft Transponders Sale Price by Application (2021-2026) & (US\$/Unit)

Table 34. Global Aircraft Transponders Sales by Company (2021-2026) & (Units)

Table 35. Global Aircraft Transponders Sales Market Share by Company (2021-2026)

Table 36. Global Aircraft Transponders Revenue by Company (2021-2026) & (\$ millions)

Table 37. Global Aircraft Transponders Revenue Market Share by Company (2021-2026)

Table 38. Global Aircraft Transponders Sale Price by Company (2021-2026) & (US\$/Unit)

Table 39. Key Manufacturers Aircraft Transponders Producing Area Distribution and Sales Area

Table 40. Players Aircraft Transponders Products Offered

Table 41. Aircraft Transponders Concentration Ratio (CR3, CR5 and CR10) & (2024-2026)

Table 42. New Products and Potential Entrants

Table 43. Market M&A Activity & Strategy

Table 44. Global Aircraft Transponders Sales by Geographic Region (2021-2026) & (Units)

Table 45. Global Aircraft Transponders Sales Market Share Geographic Region (2021-2026)

Table 46. Global Aircraft Transponders Revenue by Geographic Region (2021-2026) & (\$ millions)

Table 47. Global Aircraft Transponders Revenue Market Share by Geographic Region (2021-2026)

Table 48. Global Aircraft Transponders Sales by Country/Region (2021-2026) & (Units)

Table 49. Global Aircraft Transponders Sales Market Share by Country/Region (2021-2026)

Table 50. Global Aircraft Transponders Revenue by Country/Region (2021-2026) & (\$ millions)

Table 51. Global Aircraft Transponders Revenue Market Share by Country/Region (2021-2026)

Table 52. Americas Aircraft Transponders Sales by Country (2021-2026) & (Units)

Table 53. Americas Aircraft Transponders Sales Market Share by Country (2021-2026)

Table 54. Americas Aircraft Transponders Revenue by Country (2021-2026) & (\$

millions)

Table 55. Americas Aircraft Transponders Sales by Type (2021-2026) & (Units)

Table 56. Americas Aircraft Transponders Sales by Application (2021-2026) & (Units)

Table 57. APAC Aircraft Transponders Sales by Region (2021-2026) & (Units)

Table 58. APAC Aircraft Transponders Sales Market Share by Region (2021-2026)

Table 59. APAC Aircraft Transponders Revenue by Region (2021-2026) & (\$ millions)

Table 60. APAC Aircraft Transponders Sales by Type (2021-2026) & (Units)

Table 61. APAC Aircraft Transponders Sales by Application (2021-2026) & (Units)

Table 62. Europe Aircraft Transponders Sales by Country (2021-2026) & (Units)

Table 63. Europe Aircraft Transponders Revenue by Country (2021-2026) & (\$ millions)

Table 64. Europe Aircraft Transponders Sales by Type (2021-2026) & (Units)

Table 65. Europe Aircraft Transponders Sales by Application (2021-2026) & (Units)

Table 66. Middle East & Africa Aircraft Transponders Sales by Country (2021-2026) & (Units)

Table 67. Middle East & Africa Aircraft Transponders Revenue Market Share by Country (2021-2026)

Table 68. Middle East & Africa Aircraft Transponders Sales by Type (2021-2026) & (Units)

Table 69. Middle East & Africa Aircraft Transponders Sales by Application (2021-2026) & (Units)

Table 70. Key Market Drivers & Growth Opportunities of Aircraft Transponders

Table 71. Key Market Challenges & Risks of Aircraft Transponders

Table 72. Key Industry Trends of Aircraft Transponders

Table 73. Aircraft Transponders Raw Material

Table 74. Key Suppliers of Raw Materials

Table 75. Aircraft Transponders Distributors List

Table 76. Aircraft Transponders Customer List

Table 77. Global Aircraft Transponders Sales Forecast by Region (2027-2032) & (Units)

Table 78. Global Aircraft Transponders Revenue Forecast by Region (2027-2032) & (\$ millions)

Table 79. Americas Aircraft Transponders Sales Forecast by Country (2027-2032) & (Units)

Table 80. Americas Aircraft Transponders Annual Revenue Forecast by Country (2027-2032) & (\$ millions)

Table 81. APAC Aircraft Transponders Sales Forecast by Region (2027-2032) & (Units)

Table 82. APAC Aircraft Transponders Annual Revenue Forecast by Region (2027-2032) & (\$ millions)

Table 83. Europe Aircraft Transponders Sales Forecast by Country (2027-2032) & (Units)

Table 84. Europe Aircraft Transponders Revenue Forecast by Country (2027-2032) & (\$ millions)

Table 85. Middle East & Africa Aircraft Transponders Sales Forecast by Country (2027-2032) & (Units)

Table 86. Middle East & Africa Aircraft Transponders Revenue Forecast by Country (2027-2032) & (\$ millions)

Table 87. Global Aircraft Transponders Sales Forecast by Type (2027-2032) & (Units)

Table 88. Global Aircraft Transponders Revenue Forecast by Type (2027-2032) & (\$ millions)

Table 89. Global Aircraft Transponders Sales Forecast by Application (2027-2032) & (Units)

Table 90. Global Aircraft Transponders Revenue Forecast by Application (2027-2032) & (\$ millions)

Table 91. RTX Basic Information, Aircraft Transponders Manufacturing Base, Sales Area and Its Competitors

Table 92. RTX Aircraft Transponders Product Portfolios and Specifications

Table 93. RTX Aircraft Transponders Sales (Units), Revenue (\$ Million), Price (US\$/Unit) and Gross Margin (2021-2026)

Table 94. RTX Main Business

Table 95. RTX Latest Developments

Table 96. Thales Basic Information, Aircraft Transponders Manufacturing Base, Sales Area and Its Competitors

Table 97. Thales Aircraft Transponders Product Portfolios and Specifications

Table 98. Thales Aircraft Transponders Sales (Units), Revenue (\$ Million), Price (US\$/Unit) and Gross Margin (2021-2026)

Table 99. Thales Main Business

Table 100. Thales Latest Developments

Table 101. Honeywell Basic Information, Aircraft Transponders Manufacturing Base, Sales Area and Its Competitors

Table 102. Honeywell Aircraft Transponders Product Portfolios and Specifications

Table 103. Honeywell Aircraft Transponders Sales (Units), Revenue (\$ Million), Price (US\$/Unit) and Gross Margin (2021-2026)

Table 104. Honeywell Main Business

Table 105. Honeywell Latest Developments

Table 106. L3Harris Basic Information, Aircraft Transponders Manufacturing Base, Sales Area and Its Competitors

Table 107. L3Harris Aircraft Transponders Product Portfolios and Specifications

Table 108. L3Harris Aircraft Transponders Sales (Units), Revenue (\$ Million), Price (US\$/Unit) and Gross Margin (2021-2026)

Table 109. L3Harris Main Business

Table 110. L3Harris Latest Developments

Table 111. Acron Aviation Basic Information, Aircraft Transponders Manufacturing Base, Sales Area and Its Competitors

Table 112. Acron Aviation Aircraft Transponders Product Portfolios and Specifications

Table 113. Acron Aviation Aircraft Transponders Sales (Units), Revenue (\$ Million), Price (US\$/Unit) and Gross Margin (2021-2026)

Table 114. Acron Aviation Main Business

Table 115. Acron Aviation Latest Developments

Table 116. Garmin Basic Information, Aircraft Transponders Manufacturing Base, Sales Area and Its Competitors

Table 117. Garmin Aircraft Transponders Product Portfolios and Specifications

Table 118. Garmin Aircraft Transponders Sales (Units), Revenue (\$ Million), Price (US\$/Unit) and Gross Margin (2021-2026)

Table 119. Garmin Main Business

Table 120. Garmin Latest Developments

Table 121. BendixKing Basic Information, Aircraft Transponders Manufacturing Base, Sales Area and Its Competitors

Table 122. BendixKing Aircraft Transponders Product Portfolios and Specifications

Table 123. BendixKing Aircraft Transponders Sales (Units), Revenue (\$ Million), Price (US\$/Unit) and Gross Margin (2021-2026)

Table 124. BendixKing Main Business

Table 125. BendixKing Latest Developments

Table 126. Avidyne Basic Information, Aircraft Transponders Manufacturing Base, Sales Area and Its Competitors

Table 127. Avidyne Aircraft Transponders Product Portfolios and Specifications

Table 128. Avidyne Aircraft Transponders Sales (Units), Revenue (\$ Million), Price (US\$/Unit) and Gross Margin (2021-2026)

Table 129. Avidyne Main Business

Table 130. Avidyne Latest Developments

Table 131. Becker Avionics Basic Information, Aircraft Transponders Manufacturing Base, Sales Area and Its Competitors

Table 132. Becker Avionics Aircraft Transponders Product Portfolios and Specifications

Table 133. Becker Avionics Aircraft Transponders Sales (Units), Revenue (\$ Million), Price (US\$/Unit) and Gross Margin (2021-2026)

Table 134. Becker Avionics Main Business

Table 135. Becker Avionics Latest Developments

Table 136. Trig Avionics Basic Information, Aircraft Transponders Manufacturing Base, Sales Area and Its Competitors

Table 137. Trig Avionics Aircraft Transponders Product Portfolios and Specifications
Table 138. Trig Avionics Aircraft Transponders Sales (Units), Revenue (\$ Million), Price (US\$/Unit) and Gross Margin (2021-2026)
Table 139. Trig Avionics Main Business
Table 140. Trig Avionics Latest Developments
Table 141. Appareo Basic Information, Aircraft Transponders Manufacturing Base, Sales Area and Its Competitors
Table 142. Appareo Aircraft Transponders Product Portfolios and Specifications
Table 143. Appareo Aircraft Transponders Sales (Units), Revenue (\$ Million), Price (US\$/Unit) and Gross Margin (2021-2026)
Table 144. Appareo Main Business
Table 145. Appareo Latest Developments
Table 146. FreeFlight Systems Basic Information, Aircraft Transponders Manufacturing Base, Sales Area and Its Competitors
Table 147. FreeFlight Systems Aircraft Transponders Product Portfolios and Specifications
Table 148. FreeFlight Systems Aircraft Transponders Sales (Units), Revenue (\$ Million), Price (US\$/Unit) and Gross Margin (2021-2026)
Table 149. FreeFlight Systems Main Business
Table 150. FreeFlight Systems Latest Developments
Table 151. Dynon Avionics Basic Information, Aircraft Transponders Manufacturing Base, Sales Area and Its Competitors
Table 152. Dynon Avionics Aircraft Transponders Product Portfolios and Specifications
Table 153. Dynon Avionics Aircraft Transponders Sales (Units), Revenue (\$ Million), Price (US\$/Unit) and Gross Margin (2021-2026)
Table 154. Dynon Avionics Main Business
Table 155. Dynon Avionics Latest Developments
Table 156. uAvionix Basic Information, Aircraft Transponders Manufacturing Base, Sales Area and Its Competitors
Table 157. uAvionix Aircraft Transponders Product Portfolios and Specifications
Table 158. uAvionix Aircraft Transponders Sales (Units), Revenue (\$ Million), Price (US\$/Unit) and Gross Margin (2021-2026)
Table 159. uAvionix Main Business
Table 160. uAvionix Latest Developments
Table 161. Sagetech Avionics Basic Information, Aircraft Transponders Manufacturing Base, Sales Area and Its Competitors
Table 162. Sagetech Avionics Aircraft Transponders Product Portfolios and Specifications
Table 163. Sagetech Avionics Aircraft Transponders Sales (Units), Revenue (\$ Million),

Price (US\$/Unit) and Gross Margin (2021-2026)

Table 164. Sagetech Avionics Main Business

Table 165. Sagetech Avionics Latest Developments

Table 166. TQ Basic Information, Aircraft Transponders Manufacturing Base, Sales Area and Its Competitors

Table 167. TQ Aircraft Transponders Product Portfolios and Specifications

Table 168. TQ Aircraft Transponders Sales (Units), Revenue (\$ Million), Price (US\$/Unit) and Gross Margin (2021-2026)

Table 169. TQ Main Business

Table 170. TQ Latest Developments

Table 171. Microair Avionics Basic Information, Aircraft Transponders Manufacturing Base, Sales Area and Its Competitors

Table 172. Microair Avionics Aircraft Transponders Product Portfolios and Specifications

Table 173. Microair Avionics Aircraft Transponders Sales (Units), Revenue (\$ Million), Price (US\$/Unit) and Gross Margin (2021-2026)

Table 174. Microair Avionics Main Business

Table 175. Microair Avionics Latest Developments

Table 176. Sandia Aerospace Basic Information, Aircraft Transponders Manufacturing Base, Sales Area and Its Competitors

Table 177. Sandia Aerospace Aircraft Transponders Product Portfolios and Specifications

Table 178. Sandia Aerospace Aircraft Transponders Sales (Units), Revenue (\$ Million), Price (US\$/Unit) and Gross Margin (2021-2026)

Table 179. Sandia Aerospace Main Business

Table 180. Sandia Aerospace Latest Developments

Table 181. f.u.n.k.e. AVIONICS Basic Information, Aircraft Transponders Manufacturing Base, Sales Area and Its Competitors

Table 182. f.u.n.k.e. AVIONICS Aircraft Transponders Product Portfolios and Specifications

Table 183. f.u.n.k.e. AVIONICS Aircraft Transponders Sales (Units), Revenue (\$ Million), Price (US\$/Unit) and Gross Margin (2021-2026)

Table 184. f.u.n.k.e. AVIONICS Main Business

Table 185. f.u.n.k.e. AVIONICS Latest Developments

Table 186. Air Avionics Basic Information, Aircraft Transponders Manufacturing Base, Sales Area and Its Competitors

Table 187. Air Avionics Aircraft Transponders Product Portfolios and Specifications

Table 188. Air Avionics Aircraft Transponders Sales (Units), Revenue (\$ Million), Price (US\$/Unit) and Gross Margin (2021-2026)

Table 189. Air Avionics Main Business

Table 190. Air Avionics Latest Developments

List Of Figures

LIST OF FIGURES

- Figure 1. Picture of Aircraft Transponders
- Figure 2. Aircraft Transponders Report Years Considered
- Figure 3. Research Objectives
- Figure 4. Research Methodology
- Figure 5. Research Process and Data Source
- Figure 6. Global Aircraft Transponders Sales Growth Rate 2021-2032 (Units)
- Figure 7. Global Aircraft Transponders Revenue Growth Rate 2021-2032 (\$ millions)
- Figure 8. Aircraft Transponders Sales by Geographic Region (2021, 2025 & 2032) & (\$ millions)
- Figure 9. Aircraft Transponders Sales Market Share by Country/Region (2025)
- Figure 10. Aircraft Transponders Sales Market Share by Country/Region (2021, 2025 & 2032)
- Figure 11. Product Picture of Mode A Transponder
- Figure 12. Product Picture of Mode C Transponder
- Figure 13. Product Picture of Mode S Transponder
- Figure 14. Product Picture of Hybrid Mode Transponder
- Figure 15. Global Aircraft Transponders Sales Market Share by Type in 2026
- Figure 16. Global Aircraft Transponders Revenue Market Share by Type (2021-2026)
- Figure 17. Product Picture of Basic Identification Type
- Figure 18. Product Picture of Altitude-Encoding Type
- Figure 19. Product Picture of ADS-B Out Capable Type
- Figure 20. Product Picture of ADS-B In/Out Capable Type
- Figure 21. Global Aircraft Transponders Sales Market Share by Function in 2026
- Figure 22. Global Aircraft Transponders Revenue Market Share by Function (2021-2026)
- Figure 23. Product Picture of Rack-Mounted Type
- Figure 24. Product Picture of Panel-Mounted Type
- Figure 25. Product Picture of Integrated Avionics Type
- Figure 26. Global Aircraft Transponders Sales Market Share by Structure in 2026
- Figure 27. Global Aircraft Transponders Revenue Market Share by Structure (2021-2026)
- Figure 28. Aircraft Transponders Consumed in Commercial Transport Aircraft
- Figure 29. Global Aircraft Transponders Market: Commercial Transport Aircraft (2021-2026) & (Units)
- Figure 30. Aircraft Transponders Consumed in General Aviation Aircraft

Figure 31. Global Aircraft Transponders Market: General Aviation Aircraft (2021-2026) & (Units)

Figure 32. Aircraft Transponders Consumed in Military Aircraft

Figure 33. Global Aircraft Transponders Market: Military Aircraft (2021-2026) & (Units)

Figure 34. Aircraft Transponders Consumed in Unmanned Aerial Vehicles (UAVs)

Figure 35. Global Aircraft Transponders Market: Unmanned Aerial Vehicles (UAVs) (2021-2026) & (Units)

Figure 36. Global Aircraft Transponders Sale Market Share by Application (2025)

Figure 37. Global Aircraft Transponders Revenue Market Share by Application in 2025

Figure 38. Aircraft Transponders Sales by Company in 2025 (Units)

Figure 39. Global Aircraft Transponders Sales Market Share by Company in 2025

Figure 40. Aircraft Transponders Revenue by Company in 2025 (\$ millions)

Figure 41. Global Aircraft Transponders Revenue Market Share by Company in 2025

Figure 42. Global Aircraft Transponders Sales Market Share by Geographic Region (2021-2026)

Figure 43. Global Aircraft Transponders Revenue Market Share by Geographic Region in 2025

Figure 44. Americas Aircraft Transponders Sales 2021-2026 (Units)

Figure 45. Americas Aircraft Transponders Revenue 2021-2026 (\$ millions)

Figure 46. APAC Aircraft Transponders Sales 2021-2026 (Units)

Figure 47. APAC Aircraft Transponders Revenue 2021-2026 (\$ millions)

Figure 48. Europe Aircraft Transponders Sales 2021-2026 (Units)

Figure 49. Europe Aircraft Transponders Revenue 2021-2026 (\$ millions)

Figure 50. Middle East & Africa Aircraft Transponders Sales 2021-2026 (Units)

Figure 51. Middle East & Africa Aircraft Transponders Revenue 2021-2026 (\$ millions)

Figure 52. Americas Aircraft Transponders Sales Market Share by Country in 2025

Figure 53. Americas Aircraft Transponders Revenue Market Share by Country (2021-2026)

Figure 54. Americas Aircraft Transponders Sales Market Share by Type (2021-2026)

Figure 55. Americas Aircraft Transponders Sales Market Share by Application (2021-2026)

Figure 56. United States Aircraft Transponders Revenue Growth 2021-2026 (\$ millions)

Figure 57. Canada Aircraft Transponders Revenue Growth 2021-2026 (\$ millions)

Figure 58. Mexico Aircraft Transponders Revenue Growth 2021-2026 (\$ millions)

Figure 59. Brazil Aircraft Transponders Revenue Growth 2021-2026 (\$ millions)

Figure 60. APAC Aircraft Transponders Sales Market Share by Region in 2025

Figure 61. APAC Aircraft Transponders Revenue Market Share by Region (2021-2026)

Figure 62. APAC Aircraft Transponders Sales Market Share by Type (2021-2026)

Figure 63. APAC Aircraft Transponders Sales Market Share by Application (2021-2026)

- Figure 64. China Aircraft Transponders Revenue Growth 2021-2026 (\$ millions)
- Figure 65. Japan Aircraft Transponders Revenue Growth 2021-2026 (\$ millions)
- Figure 66. South Korea Aircraft Transponders Revenue Growth 2021-2026 (\$ millions)
- Figure 67. Southeast Asia Aircraft Transponders Revenue Growth 2021-2026 (\$ millions)
- Figure 68. India Aircraft Transponders Revenue Growth 2021-2026 (\$ millions)
- Figure 69. Australia Aircraft Transponders Revenue Growth 2021-2026 (\$ millions)
- Figure 70. China Taiwan Aircraft Transponders Revenue Growth 2021-2026 (\$ millions)
- Figure 71. Europe Aircraft Transponders Sales Market Share by Country in 2025
- Figure 72. Europe Aircraft Transponders Revenue Market Share by Country (2021-2026)
- Figure 73. Europe Aircraft Transponders Sales Market Share by Type (2021-2026)
- Figure 74. Europe Aircraft Transponders Sales Market Share by Application (2021-2026)
- Figure 75. Germany Aircraft Transponders Revenue Growth 2021-2026 (\$ millions)
- Figure 76. France Aircraft Transponders Revenue Growth 2021-2026 (\$ millions)
- Figure 77. UK Aircraft Transponders Revenue Growth 2021-2026 (\$ millions)
- Figure 78. Italy Aircraft Transponders Revenue Growth 2021-2026 (\$ millions)
- Figure 79. Russia Aircraft Transponders Revenue Growth 2021-2026 (\$ millions)
- Figure 80. Middle East & Africa Aircraft Transponders Sales Market Share by Country (2021-2026)
- Figure 81. Middle East & Africa Aircraft Transponders Sales Market Share by Type (2021-2026)
- Figure 82. Middle East & Africa Aircraft Transponders Sales Market Share by Application (2021-2026)
- Figure 83. Egypt Aircraft Transponders Revenue Growth 2021-2026 (\$ millions)
- Figure 84. South Africa Aircraft Transponders Revenue Growth 2021-2026 (\$ millions)
- Figure 85. Israel Aircraft Transponders Revenue Growth 2021-2026 (\$ millions)
- Figure 86. Turkey Aircraft Transponders Revenue Growth 2021-2026 (\$ millions)
- Figure 87. GCC Countries Aircraft Transponders Revenue Growth 2021-2026 (\$ millions)
- Figure 88. Manufacturing Cost Structure Analysis of Aircraft Transponders in 2026
- Figure 89. Manufacturing Process Analysis of Aircraft Transponders
- Figure 90. Industry Chain Structure of Aircraft Transponders
- Figure 91. Channels of Distribution
- Figure 92. Global Aircraft Transponders Sales Market Forecast by Region (2027-2032)
- Figure 93. Global Aircraft Transponders Revenue Market Share Forecast by Region (2027-2032)
- Figure 94. Global Aircraft Transponders Sales Market Share Forecast by Type

(2027-2032)

Figure 95. Global Aircraft Transponders Revenue Market Share Forecast by Type

(2027-2032)

Figure 96. Global Aircraft Transponders Sales Market Share Forecast by Application

(2027-2032)

Figure 97. Global Aircraft Transponders Revenue Market Share Forecast by Application

(2027-2032)

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