

Defense Integrated Antenna Market by Type (Aperture Antenna, Wire Antenna, Array Antenna, Microstrip Antenna), Platform (Ground, Airborne, Marine), Application, Frequency and Region (North America, APAC, Europe, MEA, RoW) - Forecast to 2026

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Abstracts

Defense integrated antenna market is projected to grow from USD 543 million in 2022 to USD 722 million by 2026, at a CAGR of 5.8% during the forecast period. An antenna converts electronic signals to electromagnetic waves (and vice versa) with a minimum loss, and an integrated antenna consists of miniaturized antennas printed on densely populated printed circuit boards (PCB) to electrically large arrays and reflector antennas. Defense integrated antennas are more ruggedized than regular commercial antennas to withstand harsh conditions. The defense integrated antenna market is expected to grow significantly in the coming years, owing to the high demand for compact/integrated antennas. These antennas should be rugged to withstand harsh environmental conditions. Modernization programs of various military vehicles and increasing procurement of defense systems for tracking, navigation, and surveillance due to terrorist activities are also expected to fuel the growth of the defense integrated antenna market.

Defense integrated antenna market is dominated by a few globally established players such as L3Harris Technologies (US), Airbus (Netherlands), General Dynamics (US), Maxar Technologies (US), and Honeywell International Inc. (US), among others, are the key manufacturers that secured Defense integrated antenna contracts in the last few years. Major focus was given to the contracts and new product development due to increase in the demand for integrated antenna products and the growth of emerging markets have encouraged companies to adopt this strategy to enter new markets.

Based on type, array antenna segment is estimated to witness the largest share of the defense integrated antenna market from 2022 to 2026.

Based on type, array antenna is estimated to witness the largest share of the defense integrated antenna market in 2022. There is a growing demand for array antennas due to the increasing need for throughput satellite communication. Thus, companies are introducing new phased array antennas for effective satellite communication.

For instance, in May 2021, Viasat demonstrated phased array antennas on business jets. The first demonstration flight took place in April 2021 during a flight from Rotterdam, Netherlands, to Payerne, Switzerland. This was part of Project AIDAN, which is led by Viasat Antenna Systems (Switzerland) and involves a consortium of partners that include Viasat Netherlands, NLR, and Lionix International.

Based on platform, marine segment of the defense integrated antenna market is projected to witness the largest share in 2022.

Based on platform, marine segment is projected to lead the defense integrated antenna market during the forecast period. The growing need of advanced antennas for reliable and high quality communication for underwater operations, large scale search and rescue mission, and for better communication between ships and drone/UAVs will drive defense integrated antenna market.

Based on application, communication segment is estimated to account for the fastest growth of the defense integrated antenna market from 2022 to 2026.

Based on application, communication segment of the defense integrated antenna market is projected to grow at the highest CAGR during the forecast period. This growth is driven due to the need for uninterrupted long-range communication through integrated antennas. Military operations are highly dependent on communication antennas to ensure effective decision-making, which is crucial to the success of military missions. Increased bandwidth and use of high frequencies have made it possible to establish uninterrupted communication between control rooms and defense personnel over long distances. For instance, in 2021, L3Harris Technologies received a contract to provide long-range communications to the US military through mosaic antennas composed of spatially distributed low size, weight, power, and cost (SWaP-C) transceiver elements.

Based on frequency, X-band is estimated to account for the largest share of the defense

integrated antenna market from 2022 to 2026.

Based on frequency, X-band segment is estimated to account for the largest share of the defense integrated antenna market during the forecast period. This growth is driven because x-band facilitates high-throughput communication from satellites to ground stations. X bands operate within a range of 8–12 GHz. X-band antennas have recently become a reality for satellites owing to the advent of commercially available monolithic microwave integrated circuits (MMICs). X-band antenna is crucial for naval operations, including searching and tracking of surface targets.

The Asia Pacific market is estimated to account for the fastest growth from 2022 to 2026 in the Defense integrated antenna market

Based on region, Asia Pacific is estimated to account for the fastest growth rate in defense integrated antenna market from 2022 to 2026. Instability across all border areas and neighboring countries, improving domestic capabilities of aerospace industry, focus on strengthening combat capabilities of UAVs by integration of antenna will drive the market. For instance, in November 2021, South Korea developed a new homegrown antenna designed for stealth aircraft, which will help reduce the possibility of detection by enemy radar systems. This antenna was developed by Agency for Defense Development (ADD) along with Hanwha Systems Co.

Prominent players from this region include L3Harris Technologies (US), Airbus (Netherlands), General Dynamics (US), Maxar Technologies (US), and Honeywell International Inc. (US).

The break-up of the profile of primary participants in the defense integrated antenna market:

By Company Type: Tier 1 – 45%, Tier 2 – 35%, and Tier 3 – 20%

By Designation: C Level – 35%, Director Level – 25%, and Others – 40%

By Region: North America – 30%, Europe – 20%, Asia Pacific – 45%, Middle East – 5%

Major companies profiled in the report include L3Harris Technologies (US), Airbus (Netherlands), General Dynamics (US), Maxar Technologies (US), and Honeywell

International Inc. (US), among others.

Research Coverage:

This market study covers the Defense integrated antenna market across various segments and subsegments. It aims at estimating the size and growth potential of this market across different segments based on type, application, frequency, platform, and region. This study also includes an in-depth competitive analysis of the key players in the market, along with their company profiles, key observations related to their product and business offerings, recent developments undertaken by them, and key market strategies adopted by them.

Reasons to buy this report:

The report will help the market leaders/new entrants in this market with information on the closest approximations of the revenue numbers for the overall defense integrated antenna market. This report will help stakeholders understand the competitive landscape and gain more insights to position their businesses better and to plan suitable go-to-market strategies. The report also helps stakeholders understand the pulse of the market and provides them with information on key market drivers, restraints, challenges, and opportunities.

The report provides insights on the following pointers:

Market Penetration: Comprehensive information on defense integrated antenna offered by the top players in the market

Product Development/Innovation: Detailed insights on upcoming technologies, research & development activities, and new product launches in the defense integrated antenna market

Market Development: Comprehensive information about lucrative markets – the report analyses the defense integrated antenna market across varied regions

Market Diversification: Exhaustive information about new products, untapped geographies, recent developments, and investments in the defense integrated antenna market

Competitive Assessment: In-depth assessment of market shares, growth

strategies, products, and manufacturing capabilities of leading players in the defense integrated antenna market

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