

Fiber Optic Cables Market for Military & Aerospace, by Platform (Civil, Military, Space), Application (Avionics, Navigation, Weapon Systems, Communication Systems), Type (Single-mode, Multi-mode), Material, and Region - Forecast to 2026

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Abstracts

The fiber optic cables market for military & aerospace size is projected to grow from USD 1.2 billion in 2021 to USD 1.5 billion by 2026, at a CAGR of 5.1% from 2021 to 2026. The market is driven by various factors, such as improved interoperability of military systems, increasing use of fiber optics in aircrafts, increasing defense expenditure of emerging economies, and increase in demand for more electric aircraft & cockpit concepts.

The electrification of aircraft based on the more electric aircraft concept and digitalization of cockpits based on the glass cockpit concept have propelled the use of fiber optic cables in aircraft. These factors are expected to drive the growth of the fiber optic cables market for military and aerospace.

Electrification based on the more electric aircraft concept

Advances in more electric technology are expected to contribute to the growth of the fiber optic cables market for military and aerospace in the near future. The incorporation of more electric technology reduces fuel consumption and provides a reliable source of power for aircraft. Electrically-driven systems serve to be an effective substitute for mechanically-driven engine accessories, pumps, and generators. Aircraft systems have witnessed revolutionary changes in terms of design and power distribution over the past few decades. Companies such as Boeing (US), Bombardier (Canada), and Airbus (France) are working on the development of electrical systems to replace the traditional

systems for optimized aircraft performance and limited maintenance costs.

Digitization based on the glass cockpit concept

The current market trend in the aviation industry is the replacement of traditional cockpits with glass cockpits. The demand for glass cockpits has been rising due to the increase in the accident rate of aircraft with traditional cockpits. Flight instrumentation displays in traditional cockpits are analog dials and gauges. The glass cockpit electronic flight instrument displays come with large LCD screens. All displays used in a glass cockpit architecture incorporate data bus technology, which uses fiber optic cables for high-speed data transfer. Data bus technology implements Line-Replaceable Units (LRUs) that are integrated with sensors and fiber optic cables throughout the aircraft. The technology improves communication between aircraft systems and the cockpit. Thus, the adoption of glass cockpit in aircraft is influencing the growth of the fiber optic cables market for military and aerospace.

The fiber optic cables market for military & aerospace includes major players Amphenol fsi (US), Carlisle Interconnect Technologies (US), Prysmian Group. (Italy), Radiall (France), Corning Optical Communications LLC (US), TE Connectivity (Switzerland), and Optical Fiber Corporation (US). These players have spread their business across various countries includes North America, Europe, Asia Pacific, Middle East, and Rest of the World. COVID-19 has impacted their businesses as well. Industry experts believe that COVID-19 has affected fiber optic cables production and services globally in 2020.

“Communication Systems: The largest segment of the Fiber optic cables market for military & aerospace, by Application. “

Communication systems require an exceptional level of tactical grade equipment, which provides access to the global information grid of shared data and information. These systems utilize fiber optic cable networks to transmit intelligence, surveillance, and reconnaissance information through different communication systems. Satellites, interlinked ground links, and communication systems are considered an important part of communication networks as they enable data transmission through secure datalinks. These data links use compatible communication protocols to share information securely between allies. For instance, the North Atlantic Treaty Organization (NATO) forces use Link 16 to exchange air force data with member countries. Other prominent systems in use by NATO forces include the Joint Tactical Information Distribution System (JTIDS).

Lockheed Martin develops communication satellites and satellites communication

systems for the US Air Force to improve its ground communication.

“Military: The fastest-growing segment of the fiber optic cables market for military & aerospace, by Platform. “

Military operations undergo extreme conditions during rescue operations and hence require more ruggedized fiber optic cables. In military aircraft, fiber optic cables are used in avionics and mission control systems for high-speed data transfer for applications such as mission data, flight planning data, and sensor data fusion for weapon systems. Thus, the increasing adoption of fiber optic cables in military aircraft and increased procurement of these aircraft is expected to boost the market for fiber optic cables market for military and aerospace. Various 4th and 5th generation fighter aircraft such as the F-35, J-20, and Su-57 use fiber optic cables onboard to monitor the performance of engines, flight control systems, and avionics.

“Multi-Mode: The fastest-growing segment of the fiber optic cables market for military & aerospace, by Type. “

Multi-mode fiber optic cables have a large diameter core that allows multiple modes of light to propagate. This increases the number of light reflections created as the light passes through the core, enabling more data to pass through at a given time. The quality of the signal is hampered over long distances due to the transmission of data in large volumes and the high attenuation rate. The wavelengths of light waves in multi-mode fibers are in the visible spectrum ranging from 850 nm to 1300 nm. In a multimode fiber, the core-to-cladding diameter ratio is 50–125 μm and 62.5–125 μm . These fibers are typically used for short-distance data and audio/video applications in LANs.

“Glass: The fastest-growing segment of the fiber optic cables market for military & aerospace, by Material. “

Glass optical fiber is made of silicon dioxide. In this type of optical fiber, core and cladding are both made up of silica; germanium or phosphorous are also added to increase the refractive index. They are mainly used for their low intrinsic absorption properties. This type of optical fiber is generally ideal for hostile environments; it performs normally even when exposed to mechanical stress, high temperatures, or chemical substances. Glass optical fiber is basically used in applications such as telecom, CATV, highspeed LANs, and sensors.

“North America: The largest contributing region in the fiber optic cables market for military & aerospace.”

The fiber optic cables market for military and aerospace in the North American region has been studied for the US and Canada. The North American fiber optic cables market for military and aerospace is estimated at USD 876.0 million in 2021 and is projected to reach USD 967.9 million by 2026, at a CAGR of 2.02% from 2021 to 2026. Huge investments are being made in various programs by the US military in aircraft and related systems, C4I systems, mission support, and space-based systems, etc. Owing to this, North America is expected to lead the fiber optic cables market for military and aerospace during the forecast period. There are various well-established and prominent fiber optic cables manufacturers in this region, including Amphenol (US), Carlisle Interconnect Technologies (US), Corning Optical Communications LLC (US), W.L. Gore & Associates (US), OFS Fitel (US), AFL (US), and Optical Cable Corp. (US).

Breakdown of primaries

The study contains insights from various industry experts, ranging from component suppliers to Tier 1 companies and OEMs. The break-up of the primaries is as follows:

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

By Designation: C Level–35%; Directors–25%; and Others–40%

By Region: North America–40%; Europe–20%; Asia Pacific–30%; Middle East & Africa–5%; and South America–5%

BAE Systems (UK), Boeing (US), Leonardo S.p.A. (Italy), Raytheon Technologies (US), Safran Group (France), Thales (France), and Northrop Grumman Corporation (US) are some of the leading players operating in the fiber optic cables market for military & aerospace report.

Research Coverage

The study covers the fiber optic cables market for military & aerospace across various segments and subsegments. It aims at estimating the size and growth potential of this market across different segments based on application, platform, type, material, 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

This report is expected to help market leaders/new entrants with information on the closest approximations of the revenue numbers for the overall fiber optic cables market for military & aerospace and its segments. This study is also expected to provide region wise information about the end use, and wherein fiber optic cables are used. This report aims at helping the stakeholders understand the competitive landscape of the market, gain insights to improve the position of their businesses and plan suitable go-to-market strategies. This report is also expected to help them understand the pulse of the market and provide them with information on key drivers, restraints, challenges, and opportunities influencing the growth of the market.

Contents

1 INTRODUCTION

1.1 OBJECTIVES OF THE STUDY

1.2 DEFINITION

1.2.1 FIBER OPTIC CABLES MARKET FOR MILITARY AND AEROSPACE, BY APPLICATION: INCLUSIONS AND EXCLUSIONS

1.2.2 FIBER OPTIC CABLES MARKET FOR MILITARY AND AEROSPACE, BY PLATFORM: INCLUSIONS AND EXCLUSIONS

1.3 MARKET SCOPE

1.3.1 MARKET SEGMENTATION

1.3.2 GEOGRAPHIC SCOPE

1.3.3 YEARS CONSIDERED

1.4 CURRENCY & PRICING

1.5 LIMITATIONS

1.6 MARKET STAKEHOLDERS

1.7 SUMMARY OF CHANGES

2 RESEARCH METHODOLOGY

2.1 RESEARCH DATA

FIGURE 1 REPORT PROCESS FLOW

FIGURE 2 FIBER OPTIC CABLES MARKET FOR MILITARY AND AEROSPACE: RESEARCH DESIGN

2.1.1 SECONDARY DATA

2.1.1.1 Key data from secondary sources

2.1.2 PRIMARY DATA

2.1.2.1 Key data from primary sources

2.1.2.2 Break-up of primaries

2.2 FACTOR ANALYSIS

2.2.1 INTRODUCTION

2.2.2 DEMAND-SIDE INDICATORS

2.3 MARKET SIZE ESTIMATION & METHODOLOGY

2.3.1 BOTTOM-UP APPROACH

FIGURE 3 MARKET SIZE ESTIMATION METHODOLOGY: BOTTOM-UP APPROACH

2.3.1.1 COVID-19 impact on market analysis

2.3.2 TOP-DOWN APPROACH

FIGURE 4 MARKET SIZE ESTIMATION METHODOLOGY: TOP-DOWN APPROACH

2.4 DATA TRIANGULATION

FIGURE 5 DATA TRIANGULATION

2.5 RESEARCH ASSUMPTIONS

TABLE 1 ASSUMPTIONS FOR RESEARCH STUDY ON FIBER OPTIC CABLES MARKET FOR MILITARY AND AEROSPACE

2.6 LIMITATIONS/GREY AREAS

2.7 RISKS

3 EXECUTIVE SUMMARY

FIGURE 6 SINGLE-MODE CABLES TO LEAD THE FIBER OPTIC CABLES MARKET FOR MILITARY AND AEROSPACE, BY TYPE DURING THE FORCAST PERIOD

FIGURE 7 FIBER OPTIC CABLES MARKET FOR MILITARY AND AEROSPACE, BY PLATFORM, 2021 & 2026 (USD MILLION)

FIGURE 8 COMMUNICATION SYSTEMS APPLICATION SEGMENT PROJECTED TO GROW AT THE HIGHEST CAGR FROM 2021 TO 2026

FIGURE 9 ASIA PACIFIC PROJECTED TO LEAD THE FIBER OPTIC CABLES MARKET FOR MILITARY AND AEROSPACE IN 2021

4 PREMIUM INSIGHTS

4.1 ATTRACTIVE GROWTH OPPORTUNITIES IN FIBER OPTIC CABLES MARKET FOR MILITARY & AEROSPACE

4.2 FIBER OPTIC CABLES MARKET FOR MILITARY & AEROSPACE, BY PLATFORM

FIGURE 10 LAND SEGMENT TO LEAD THE FIBER OPTIC CABLES MARKET FOR MILITARY AND AEROSPACE MARKET IN THE FORECAST PERIOD

4.3 FIBER OPTIC CABLES MARKET FOR MILITARY & AEROSPACE MARKET, BY COUNTRY

FIGURE 11 RUSSIA EXPECTED TO LEAD FIBER OPTIC CABLES MARKET FOR MILITARY AND AEROSPACE FROM 2021 TO 2026

5 MARKET OVERVIEW

5.1 INTRODUCTION

5.2 MARKET DYNAMICS

FIGURE 12 FIBER OPTIC CABLES MARKET FOR MILITARY AND AEROSPACE: DRIVERS, RESTRAINTS, OPPORTUNITIES, AND CHALLENGES

5.2.1 DRIVERS

5.2.1.1 Increasing use in new and upgraded aircraft

TABLE 2 ESTIMATED REGION-WISE DELIVERIES OF NEW AIRCRAFT BETWEEN 2016 AND 2035

- 5.2.1.2 Improved interoperability of military systems
- 5.2.1.3 Increase in demand for more electric aircraft and glass cockpit concepts
- 5.2.1.4 Rise in demand for throughput and reliability
- 5.2.1.5 Use of IoT and fiber optics in sensing applications

5.2.2 RESTRAINTS

- 5.2.2.1 Susceptibility to physical damage and transmission loss

5.2.3 OPPORTUNITIES

- 5.2.3.1 Use of photonics technology in electronic warfare networks
- 5.2.3.2 Demand for optical add-drop multiplexer (OADM) networks

5.2.4 CHALLENGES

- 5.2.4.1 Adherence to stringent regulatory norms
- 5.2.4.2 Threat to optical network security
- 5.2.4.3 Complex maintenance and installation requirements

5.3 COVID-19 IMPACT SCENARIOS

FIGURE 13 SAME AS COVID IMPACT SCENARIOS (PESSIMISTI, REALISTIC & OPTIMISTI)

5.4 IMPACT OF COVID-19 ON FIBER OPTIC CABLES MARKET FOR MILITARY AND AEROSPACE

FIGURE 14 COVID-19 IMPACT: FIBER OPTIC CABLES MARKET FOR MILITARY AND AEROSPACE

5.4.1 DEMAND-SIDE IMPACT

- 5.4.1.1 Key developments from January 2020 to August 2021

TABLE 3 KEY DEVELOPMENTS IN FIBER OPTIC CABLES MARKET FOR MILITARY AND AEROSPACE 2020-2021

5.4.2 SUPPLY-SIDE IMPACT

5.5 TRENDS/DISRUPTIONS IMPACTING CUSTOMERS' BUSINESS

- 5.5.1 DEVELOPMENT OF MORE ELECTRIC AIRCRAFT (MEA)
- 5.5.2 INCREASED USE OF DIGITAL AVIONICS IN COMMERCIAL AND MILITARY AIRCRAFT

FIGURE 15 TRENDS AND DISRUPTIONS IMPACTING CUSTOMERS

5.6 MARKET ECOSYSTEM

- 5.6.1 PROMINENT COMPANIES
- 5.6.2 PRIVATE AND SMALL ENTERPRISES
- 5.6.3 END USERS

FIGURE 16 MILITARY AND AEROSPACE FIBER OPTIC CABLES MARKET

ECOSYSTEM

TABLE 4 MARKET ECOSYSTEM: FIBER OPTIC CABLES FOR MILITARY AND AEROSPACE

5.7 PRICING ANALYSIS

5.7.1 AVERAGE SELLING PRICE ANALYSIS OF FIBER OPTIC CABLES FOR MILITARY & AEROSPACE (2020)

5.8 TARIFF AND REGULATORY LANDSCAPE FOR DEFENSE INDUSTRY

5.9 TRADE ANALYSIS

TABLE 5 COUNTRY-WISE EXPORTS, 2019-2020 (USD THOUSAND)

TABLE 6 COUNTRY-WISE IMPORTS, 2019-2020 (USD THOUSAND)

5.10 VALUE CHAIN ANALYSIS OF FIBER OPTIC CABLES MARKET FOR MILITARY AND AEROSPACE

FIGURE 17 VALUE CHAIN ANALYSIS

5.11 PORTER'S FIVE FORCES MODEL

5.11.1 FIBER OPTIC CABLES MARKET FOR MILITARY AND AEROSPACE: PORTER'S FIVE FORCE ANALYSIS

5.11.2 THREAT OF NEW ENTRANTS

5.11.3 THREAT OF SUBSTITUTES

5.11.4 BARGAINING POWER OF SUPPLIERS

5.11.5 BARGAINING POWER OF BUYERS

5.11.6 INTENSITY OF COMPETITIVE RIVALRY

5.12 TECHNOLOGY ANALYSIS

5.12.1 HONEYWELL: NEXT-GENERATION FLIGHT MANAGEMENT SYSTEM (NGFMS)

5.13 USE CASES

5.13.1 AIRBUS: USE OF FIBER OPTIC CABLES IN A380 AIRCRAFT

5.14 OPERATIONAL DATA

TABLE 7 NEW COMMERCIAL AIRPLANE DELIVERIES, BY REGION, 2019-2038

6 INDUSTRY TRENDS

6.1 INTRODUCTION

6.2 SUPPLY CHAIN ANALYSIS

FIGURE 18 SUPPLY CHAIN ANALYSIS

6.2.1 MAJOR COMPANIES

6.2.2 SMALL AND MEDIUM ENTERPRISES

6.2.3 END USERS/CUSTOMERS

6.3 EMERGING INDUSTRY TRENDS

6.3.1 USE OF FIBER OPTIC CABLES IN IN-FLIGHT ENTERTAINMENT (IFE).

- 6.3.2 USE OF FIBER OPTIC CABLES IN FLIGHT CONTROL SYSTEMS
- 6.4 INNOVATIONS AND PATENTS REGISTRATIONS, 2012-2021
- 6.5 IMPACT OF MEGATREND
 - 6.5.1 IN-FLIGHT HIGH-SPEED INTERNET AND WI-FI ACCESS PROVIDED
 - 6.5.2 ONGOING INNOVATION IN DEFENSE SECTOR

7 FIBER OPTIC CABLES MARKET FOR MILITARY AND AEROSPACE, BY APPLICATION

7.1 INTRODUCTION

FIGURE 19 FIBER OPTIC CABLES MARKET FOR MILITARY AND AEROSPACE, BY APPLICATION, 2021 & 2026 (USD MILLION)

TABLE 8 FIBER OPTIC CABLES MARKET FOR MILITARY AND AEROSPACE, BY APPLICATION, 2017–2020 (USD MILLION)

TABLE 9 FIBER OPTIC CABLES MARKET FOR MILITARY AND AEROSPACE, BY APPLICATION, 2021–2026 (USD MILLION)

7.2 AVIONICS

7.3 COMMUNICATION SYSTEMS

7.4 NAVIGATION & SENSING

7.5 WEAPON SYSTEMS

7.6 OTHERS

8 FIBER OPTIC CABLES MARKET FOR MILITARY AND AEROSPACE, BY PLATFORM

8.1 INTRODUCTION

FIGURE 20 FIBER OPTIC CABLES MARKET FOR MILITARY AND AEROSPACE, BY PLATFORM, 2021 & 2026 (USD MILLION)

TABLE 10 FIBER OPTIC CABLES MARKET FOR MILITARY AND AEROSPACE, BY PLATFORM, 2017–2020 (USD MILLION)

TABLE 11 FIBER OPTIC CABLES MARKET FOR MILITARY AND AEROSPACE, BY PLATFORM, 2021–2026 (USD MILLION)

8.2 CIVIL

TABLE 12 FIBER OPTIC CABLES MARKET FOR MILITARY AND AEROSPACE, BY CIVIL, 2017–2020 (USD MILLION)

TABLE 13 FIBER OPTIC CABLES MARKET FOR MILITARY AND AEROSPACE, BY CIVIL, 2021–2026 (USD MILLION)

8.2.1 COMMERCIAL

8.2.1.1 Narrow-body aircraft

8.2.1.2 Wide-body aircraft

8.2.1.3 Regional transport aircraft

8.2.2 BUSINESS JETS

8.2.3 LIGHT AIRCRAFT

8.2.4 ROTORCRAFT

8.3 MILITARY

TABLE 14 FIBER OPTIC CABLES MARKET FOR MILITARY AND AEROSPACE, BY MILITARY, 2017–2020 (USD MILLION)

TABLE 15 FIBER OPTIC CABLES MARKET FOR MILITARY AND AEROSPACE, BY MILITARY, 2021–2026 (USD MILLION)

8.3.1 AIRBORNE

TABLE 16 FIBER OPTIC CABLES MARKET FOR MILITARY AND AEROSPACE, BY MILITARY AIRBORNE, 2017–2020 (USD MILLION)

TABLE 17 FIBER OPTIC CABLES MARKET FOR MILITARY AND AEROSPACE, BY MILITARY AIRBORNE, 2021–2026 (USD MILLION)

8.3.1.1 Combat aircraft

8.3.1.2 Unmanned aerial vehicles

8.3.1.3 Military transport aircraft

8.3.1.4 Military helicopters

8.3.2 LAND

TABLE 18 FIBER OPTIC CABLES MARKET FOR MILITARY AND AEROSPACE, BY LAND, 2017–2020 (USD MILLION)

TABLE 19 FIBER OPTIC CABLES MARKET FOR MILITARY AND AEROSPACE, BY LAND, 2021–2026 (USD MILLION)

8.3.2.1 Armored vehicles

8.3.2.2 Unmanned ground vehicles

8.3.2.3 C4ISR

8.3.3 MARINE

TABLE 20 FIBER OPTIC CABLES MARKET FOR MILITARY AND AEROSPACE, BY MARINE, 2017–2020 (USD MILLION)

TABLE 21 FIBER OPTIC CABLES MARKET FOR MILITARY AND AEROSPACE, BY MARINE, 2021–2026 (USD MILLION)

8.3.3.1 Destroyers

8.3.3.2 Frigates

8.3.3.3 Unmanned maritime vehicles

8.3.3.4 Submarines

8.3.3.5 Offshore Patrol Vessels (OPVS)

8.3.3.6 Aircraft carriers

8.4 SPACE

TABLE 22 FIBER OPTIC CABLES MARKET FOR MILITARY AND AEROSPACE, BY SPACE, 2017–2020 (USD MILLION)

TABLE 23 FIBER OPTIC CABLES MARKET FOR MILITARY AND AEROSPACE, BY SPACE, 2021–2026 (USD MILLION)

8.4.1 SPACE LAUNCH VEHICLES

8.4.2 SATELLITES

9 FIBER OPTIC CABLES MARKET FOR MILITARY AND AEROSPACE, BY TYPE

9.1 INTRODUCTION

FIGURE 21 FIBER OPTIC CABLES MARKET FOR MILITARY AND AEROSPACE, BY TYPE, 2021 & 2026 (USD MILLION)

TABLE 24 FIBER OPTIC CABLES MARKET FOR MILITARY AND AEROSPACE, BY TYPE, 2017–2020 (USD MILLION)

TABLE 25 FIBER OPTIC CABLES MARKET FOR MILITARY AND AEROSPACE, BY TYPE, 2021–2026 (USD MILLION)

9.2 SINGLE-MODE

9.3 MULTI-MODE

10 FIBER OPTIC CABLES MARKET FOR MILITARY & AEROSPACE, BY MATERIAL

10.1 INTRODUCTION

FIGURE 22 GLASS FIBERS SEGMENT TO COMMAND LARGEST SHARE DURING FORECAST PERIOD

TABLE 26 FIBER OPTIC CABLES MARKET FOR MILITARY AND AEROSPACE, BY MATERIAL, 2017–2020 (USD MILLION)

TABLE 27 FIBER OPTIC CABLES MARKET FOR MILITARY AND AEROSPACE, BY MATERIAL, 2021–2026 (USD MILLION)

10.2 GLASS FIBER

TABLE 28 MILITARY AND AEROSPACE SYSTEMS THAT USE GLASS FIBERS

10.3 PLASTIC FIBER

TABLE 29 MILITARY AND AEROSPACE SYSTEMS THAT USE PLASTIC FIBERS

11 REGIONAL ANALYSIS

11.1 INTRODUCTION

FIGURE 23 FIBER OPTIC CABLES MARKET FOR MILITARY AND AEROSPACE: REGIONAL SNAPSHOT

11.2 IMPACT OF COVID-19 ON FIBER OPTIC CABLES MARKET FOR MILITARY AND AEROSPACE

FIGURE 24 IMPACT OF COVID-19 ON FIBER OPTIC CABLES MARKET FOR MILITARY AND AEROSPACE

TABLE 30 GLOBAL FIBER OPTIC CABLES MARKET FOR MILITARY AND AEROSPACE, BY REGION, 2017–2020 (USD MILLION)

TABLE 31 GLOBAL FIBER OPTIC CABLES MARKET FOR MILITARY AND AEROSPACE, BY REGION, 2021–2026 (USD MILLION)

TABLE 32 GLOBAL FIBER OPTIC CABLES MARKET FOR MILITARY AND AEROSPACE, BY PLATFORM, 2017–2020 (USD MILLION)

TABLE 33 GLOBAL FIBER OPTIC CABLES MARKET FOR MILITARY AND AEROSPACE, BY PLATFORM, 2021–2026 (USD MILLION)

TABLE 34 GLOBAL FIBER OPTIC CABLES MARKET FOR MILITARY AND AEROSPACE, BY TYPE, 2017–2020 (USD MILLION)

TABLE 35 GLOBAL FIBER OPTIC CABLES MARKET FOR MILITARY AND AEROSPACE, BY TYPE, 2021–2026 (USD MILLION)

TABLE 36 GLOBAL FIBER OPTIC CABLES MARKET FOR MILITARY AND AEROSPACE, BY MATERIAL, 2017–2020 (USD MILLION)

TABLE 37 GLOBAL FIBER OPTIC CABLES MARKET FOR MILITARY AND AEROSPACE, BY MATERIAL, 2021–2026 (USD MILLION)

11.3 NORTH AMERICA

11.3.1 IMPACT OF COVID-19

FIGURE 25 NORTH AMERICA: FIBER OPTIC CABLES MARKET FOR MILITARY AND AEROSPACE SNAPSHOT

TABLE 38 NORTH AMERICA: FIBER OPTIC CABLES MARKET FOR MILITARY AND AEROSPACE, BY COUNTRY, 2017–2020 (USD MILLION)

TABLE 39 NORTH AMERICA: FIBER OPTIC CABLES MARKET FOR MILITARY AND AEROSPACE, BY COUNTRY, 2021–2026 (USD MILLION)

TABLE 40 NORTH AMERICA: FIBER OPTIC CABLES MARKET FOR MILITARY AND AEROSPACE, BY PLATFORM, 2017–2020 (USD MILLION)

TABLE 41 NORTH AMERICA: FIBER OPTIC CABLES MARKET FOR MILITARY AND AEROSPACE, BY PLATFORM, 2021–2026 (USD MILLION)

TABLE 42 NORTH AMERICA: FIBER OPTIC CABLES MARKET FOR MILITARY AND AEROSPACE, BY TYPE, 2017–2020 (USD MILLION)

TABLE 43 NORTH AMERICA: FIBER OPTIC CABLES MARKET FOR MILITARY AND AEROSPACE, BY TYPE, 2021–2026 (USD MILLION)

TABLE 44 NORTH AMERICA: FIBER OPTIC CABLES MARKET FOR MILITARY AND AEROSPACE, BY MATERIAL, 2017–2020 (USD MILLION)

TABLE 45 NORTH AMERICA: FIBER OPTIC CABLES MARKET FOR MILITARY AND

AEROSPACE, BY MATERIAL, 2021–2026 (USD MILLION)**11.3.2 PESTLE ANALYSIS: NORTH AMERICA****11.3.3 US****TABLE 46 US: FIBER OPTIC CABLES MARKET FOR MILITARY AND AEROSPACE, BY PLATFORM, 2017–2020 (USD MILLION)****TABLE 47 US: FIBER OPTIC CABLES MARKET FOR MILITARY AND AEROSPACE, BY PLATFORM, 2021–2026 (USD MILLION)****TABLE 48 US: FIBER OPTIC CABLES MARKET FOR MILITARY AND AEROSPACE, BY TYPE, 2017–2020 (USD MILLION)****TABLE 49 US: FIBER OPTIC CABLES MARKET FOR MILITARY AND AEROSPACE, BY TYPE, 2021–2026 (USD MILLION)****TABLE 50 US: FIBER OPTIC CABLES MARKET FOR MILITARY AND AEROSPACE, BY MATERIAL, 2017–2020 (USD MILLION)****TABLE 51 US: FIBER OPTIC CABLES MARKET FOR MILITARY AND AEROSPACE, BY MATERIAL, 2021–2026 (USD MILLION)****11.3.4 CANADA****TABLE 52 CANADA: FIBER OPTIC CABLES MARKET FOR MILITARY AND AEROSPACE, BY PLATFORM, 2017–2020 (USD MILLION)****TABLE 53 CANADA: FIBER OPTIC CABLES MARKET FOR MILITARY AND AEROSPACE, BY PLATFORM, 2021–2026 (USD MILLION)****TABLE 54 CANADA: FIBER OPTIC CABLES MARKET FOR MILITARY AND AEROSPACE, BY TYPE, 2017–2020 (USD MILLION)****TABLE 55 CANADA: FIBER OPTIC CABLES MARKET FOR MILITARY AND AEROSPACE, BY TYPE, 2021–2026 (USD MILLION)****TABLE 56 CANADA: FIBER OPTIC CABLES MARKET FOR MILITARY AND AEROSPACE, BY MATERIAL, 2017–2020 (USD MILLION)****TABLE 57 CANADA: FIBER OPTIC CABLES MARKET FOR MILITARY AND AEROSPACE, BY MATERIAL, 2021–2026 (USD MILLION)****11.4 EUROPE****11.4.1 IMPACT OF COVID-19****FIGURE 26 EUROPE: FIBER OPTIC CABLES MARKET FOR MILITARY AND AEROSPACE SNAPSHOT****TABLE 58 EUROPE: FIBER OPTIC CABLES MARKET FOR MILITARY AND AEROSPACE, BY NATION, 2017–2020 (USD MILLION)****TABLE 59 EUROPE: FIBER OPTIC CABLES MARKET FOR MILITARY AND AEROSPACE, BY NATION, 2021–2026 (USD MILLION)****TABLE 60 EUROPE: FIBER OPTIC CABLES MARKET FOR MILITARY AND AEROSPACE, BY PLATFORM, 2017–2020 (USD MILLION)****TABLE 61 EUROPE: FIBER OPTIC CABLES MARKET FOR MILITARY AND**

AEROSPACE, BY PLATFORM, 2021–2026 (USD MILLION)

TABLE 62 EUROPE: FIBER OPTIC CABLES MARKET FOR MILITARY AND AEROSPACE, BY TYPE, 2017–2020 (USD MILLION)

TABLE 63 EUROPE: FIBER OPTIC CABLES MARKET FOR MILITARY AND AEROSPACE, BY TYPE, 2021–2026 (USD MILLION)

TABLE 64 EUROPE: FIBER OPTIC CABLES MARKET FOR MILITARY AND AEROSPACE, BY MATERIAL, 2017–2020 (USD MILLION)

TABLE 65 EUROPE: FIBER OPTIC CABLES MARKET FOR MILITARY AND AEROSPACE, BY MATERIAL, 2021–2026 (USD MILLION)

11.4.2 PESTLE ANALYSIS: EUROPE

11.4.2.1 Political

11.4.2.2 Economic

11.4.2.3 Social

11.4.2.4 Technological

11.4.2.5 Legal

11.4.2.6 Environmental

11.4.3 UK

TABLE 66 UK: FIBER OPTIC CABLES MARKET FOR MILITARY AND AEROSPACE, BY PLATFORM, 2017–2020 (USD MILLION)

TABLE 67 UK: FIBER OPTIC CABLES MARKET FOR MILITARY AND AEROSPACE, BY PLATFORM, 2021–2026 (USD MILLION)

TABLE 68 UK: FIBER OPTIC CABLES MARKET FOR MILITARY AND AEROSPACE, BY TYPE, 2017–2020 (USD MILLION)

TABLE 69 UK: FIBER OPTIC CABLES MARKET FOR MILITARY AND AEROSPACE, BY TYPE, 2021–2026 (USD MILLION)

TABLE 70 UK: FIBER OPTIC CABLES MARKET FOR MILITARY AND AEROSPACE, BY MATERIAL, 2017–2020 (USD MILLION)

TABLE 71 UK: FIBER OPTIC CABLES MARKET FOR MILITARY AND AEROSPACE, BY MATERIAL, 2021–2026 (USD MILLION)

11.4.4 FRANCE

TABLE 72 FRANCE FIBER OPTIC CABLES MARKET FOR MILITARY AND AEROSPACE, BY PLATFORM, 2017–2020 (USD MILLION)

TABLE 73 FRANCE: FIBER OPTIC CABLES MARKET FOR MILITARY AND AEROSPACE, BY PLATFORM, 2021–2026 (USD MILLION)

TABLE 74 FRANCE: FIBER OPTIC CABLES MARKET FOR MILITARY AND AEROSPACE, BY TYPE, 2017–2020 (USD MILLION)

TABLE 75 FRANCE: FIBER OPTIC CABLES MARKET FOR MILITARY AND AEROSPACE, BY TYPE, 2021–2026 (USD MILLION)

TABLE 76 FRANCE: FIBER OPTIC CABLES MARKET FOR MILITARY AND

AEROSPACE, BY MATERIAL, 2017–2020 (USD MILLION)

TABLE 77 FRANCE: FIBER OPTIC CABLES MARKET FOR MILITARY AND AEROSPACE, BY MATERIAL, 2021–2026 (USD MILLION)

11.4.5 GERMANY

TABLE 78 GERMANY: FIBER OPTIC CABLES MARKET FOR MILITARY AND AEROSPACE, BY PLATFORM, 2017–2020 (USD MILLION)

TABLE 79 GERMANY: FIBER OPTIC CABLES MARKET FOR MILITARY AND AEROSPACE, BY PLATFORM, 2021–2026 (USD MILLION)

TABLE 80 GERMANY: FIBER OPTIC CABLES MARKET FOR MILITARY AND AEROSPACE, BY TYPE, 2017–2020 (USD MILLION)

TABLE 81 GERMANY: FIBER OPTIC CABLES MARKET FOR MILITARY AND AEROSPACE, BY TYPE, 2021–2026 (USD MILLION)

TABLE 82 GERMANY: FIBER OPTIC CABLES MARKET FOR MILITARY AND AEROSPACE, BY MATERIAL, 2017–2020 (USD MILLION)

TABLE 83 GERMANY: FIBER OPTIC CABLES MARKET FOR MILITARY AND AEROSPACE, BY MATERIAL, 2021–2026 (USD MILLION)

11.4.6 ITALY

TABLE 84 ITALY: FIBER OPTIC CABLES MARKET FOR MILITARY AND AEROSPACE, BY PLATFORM, 2017–2020 (USD MILLION)

TABLE 85 ITALY: FIBER OPTIC CABLES MARKET FOR MILITARY AND AEROSPACE, BY PLATFORM, 2021–2026 (USD MILLION)

TABLE 86 ITALY: FIBER OPTIC CABLES MARKET FOR MILITARY AND AEROSPACE, BY TYPE, 2017–2020 (USD MILLION)

TABLE 87 ITALY: FIBER OPTIC CABLES MARKET FOR MILITARY AND AEROSPACE, BY TYPE, 2021–2026 (USD MILLION)

TABLE 88 ITALY: FIBER OPTIC CABLES MARKET FOR MILITARY AND AEROSPACE, BY MATERIAL, 2017–2020 (USD MILLION)

TABLE 89 ITALY: FIBER OPTIC CABLES MARKET FOR MILITARY AND AEROSPACE, BY MATERIAL, 2021–2026 (USD MILLION)

11.4.7 RUSSIA

TABLE 90 RUSSIA: FIBER OPTIC CABLES MARKET FOR MILITARY AND AEROSPACE, BY PLATFORM, 2017–2020 (USD MILLION)

TABLE 91 RUSSIA: FIBER OPTIC CABLES MARKET FOR MILITARY AND AEROSPACE, BY PLATFORM, 2021–2026 (USD MILLION)

TABLE 92 RUSSIA: FIBER OPTIC CABLES MARKET FOR MILITARY AND AEROSPACE, BY TYPE, 2017–2020 (USD MILLION)

TABLE 93 RUSSIA: FIBER OPTIC CABLES MARKET FOR MILITARY AND AEROSPACE, BY TYPE, 2021–2026 (USD MILLION)

TABLE 94 RUSSIA: FIBER OPTIC CABLES MARKET FOR MILITARY AND

AEROSPACE, BY MATERIAL, 2017–2020 (USD MILLION)

TABLE 95 RUSSIA: FIBER OPTIC CABLES MARKET FOR MILITARY AND AEROSPACE, BY MATERIAL, 2021–2026 (USD MILLION)

11.4.8 REST OF EUROPE

TABLE 96 REST OF EUROPE: FIBER OPTIC CABLES MARKET FOR MILITARY AND AEROSPACE, BY PLATFORM, 2017–2020 (USD MILLION)

TABLE 97 REST OF EUROPE: FIBER OPTIC CABLES MARKET FOR MILITARY AND AEROSPACE, BY PLATFORM, 2021–2026 (USD MILLION)

TABLE 98 REST OF EUROPE: FIBER OPTIC CABLES MARKET FOR MILITARY AND AEROSPACE, BY TYPE, 2017–2020 (USD MILLION)

TABLE 99 REST OF EUROPE: FIBER OPTIC CABLES MARKET FOR MILITARY AND AEROSPACE, BY TYPE, 2021–2026 (USD MILLION)

TABLE 100 REST OF EUROPE: FIBER OPTIC CABLES MARKET FOR MILITARY AND AEROSPACE, BY MATERIAL, 2017–2020 (USD MILLION)

TABLE 101 REST OF EUROPE: FIBER OPTIC CABLES MARKET FOR MILITARY AND AEROSPACE, BY MATERIAL, 2021–2026 (USD MILLION)

11.5 ASIA PACIFIC

FIGURE 27 ASIA PACIFIC FIBER OPTIC CABLES MARKET FOR MILITARY AND AEROSPACE SNAPSHOT

TABLE 102 ASIA PACIFIC: FIBER OPTIC CABLES MARKET FOR MILITARY AND AEROSPACE, BY NATION, 2017–2020 (USD MILLION)

TABLE 103 ASIA PACIFIC: FIBER OPTIC CABLES MARKET FOR MILITARY AND AEROSPACE, BY NATION, 2021–2026 (USD MILLION)

TABLE 104 ASIA PACIFIC: FIBER OPTIC CABLES MARKET FOR MILITARY AND AEROSPACE, BY PLATFORM, 2017–2020 (USD MILLION)

TABLE 105 ASIA PACIFIC: FIBER OPTIC CABLES MARKET FOR MILITARY AND AEROSPACE, BY PLATFORM, 2021–2026 (USD MILLION)

TABLE 106 ASIA PACIFIC: FIBER OPTIC CABLES MARKET FOR MILITARY AND AEROSPACE, BY TYPE, 2017–2020 (USD MILLION)

TABLE 107 ASIA PACIFIC: FIBER OPTIC CABLES MARKET FOR MILITARY AND AEROSPACE, BY TYPE, 2021–2026 (USD MILLION)

TABLE 108 ASIA PACIFIC: FIBER OPTIC CABLES MARKET FOR MILITARY AND AEROSPACE, BY MATERIAL, 2017–2020 (USD MILLION)

TABLE 109 ASIA PACIFIC: FIBER OPTIC CABLES MARKET FOR MILITARY AND AEROSPACE, BY MATERIAL, 2021–2026 (USD MILLION)

11.5.1 COVID-19 IMPACT ON ASIA PACIFIC

11.5.2 PESTLE ANALYSIS: ASIA PACIFIC

11.5.3 CHINA

TABLE 110 CHINA: FIBER OPTIC CABLES MARKET FOR MILITARY AND

AEROSPACE, BY PLATFORM, 2017–2020 (USD MILLION)

TABLE 111 CHINA: FIBER OPTIC CABLES MARKET FOR MILITARY AND AEROSPACE, BY PLATFORM, 2021–2026 (USD MILLION)

TABLE 112 CHINA: FIBER OPTIC CABLES MARKET FOR MILITARY AND AEROSPACE, BY TYPE, 2017–2020 (USD MILLION)

TABLE 113 CHINA: FIBER OPTIC CABLES MARKET FOR MILITARY AND AEROSPACE, BY TYPE, 2021–2026 (USD MILLION)

TABLE 114 CHINA: FIBER OPTIC CABLES MARKET FOR MILITARY AND AEROSPACE, BY MATERIAL, 2017–2020 (USD MILLION)

TABLE 115 CHINA: FIBER OPTIC CABLES MARKET FOR MILITARY AND AEROSPACE, BY MATERIAL, 2021–2026 (USD MILLION)

11.5.4 JAPAN

TABLE 116 JAPAN: FIBER OPTIC CABLES MARKET FOR MILITARY AND AEROSPACE, BY PLATFORM, 2017–2020 (USD MILLION)

TABLE 117 JAPAN: FIBER OPTIC CABLES MARKET FOR MILITARY AND AEROSPACE, BY PLATFORM, 2021–2026 (USD MILLION)

TABLE 118 JAPAN: FIBER OPTIC CABLES MARKET FOR MILITARY AND AEROSPACE, BY TYPE, 2017–2020 (USD MILLION)

TABLE 119 JAPAN: FIBER OPTIC CABLES MARKET FOR MILITARY AND AEROSPACE, BY TYPE, 2021–2026 (USD MILLION)

TABLE 120 JAPAN: FIBER OPTIC CABLES MARKET FOR MILITARY AND AEROSPACE, BY MATERIAL, 2017–2020 (USD MILLION)

TABLE 121 JAPAN: FIBER OPTIC CABLES MARKET FOR MILITARY AND AEROSPACE, BY MATERIAL, 2021–2026 (USD MILLION)

11.5.5 INDIA

TABLE 122 INDIA: FIBER OPTIC CABLES MARKET FOR MILITARY AND AEROSPACE, BY PLATFORM, 2017–2020 (USD MILLION)

TABLE 123 INDIA: FIBER OPTIC CABLES MARKET FOR MILITARY AND AEROSPACE, BY PLATFORM, 2021–2026 (USD MILLION)

TABLE 124 INDIA: FIBER OPTIC CABLES MARKET FOR MILITARY AND AEROSPACE, BY TYPE, 2017–2020 (USD MILLION)

TABLE 125 INDIA: FIBER OPTIC CABLES MARKET FOR MILITARY AND AEROSPACE, BY TYPE, 2021–2026 (USD MILLION)

TABLE 126 INDIA: FIBER OPTIC CABLES MARKET FOR MILITARY AND AEROSPACE, BY MATERIAL, 2017–2020 (USD MILLION)

TABLE 127 INDIA FIBER OPTIC CABLES MARKET FOR MILITARY AND AEROSPACE, BY MATERIAL, 2021–2026 (USD MILLION)

11.5.6 SOUTH KOREA

TABLE 128 SOUTH KOREA: FIBER OPTIC CABLES MARKET FOR MILITARY AND

AEROSPACE, BY PLATFORM, 2017–2020 (USD MILLION)

TABLE 129 SOUTH KOREA: FIBER OPTIC CABLES MARKET FOR MILITARY AND AEROSPACE, BY PLATFORM, 2021–2026 (USD MILLION)

TABLE 130 SOUTH KOREA: FIBER OPTIC CABLES MARKET FOR MILITARY AND AEROSPACE, BY TYPE, 2017–2020 (USD MILLION)

TABLE 131 SOUTH KOREA: FIBER OPTIC CABLES MARKET FOR MILITARY AND AEROSPACE, BY TYPE, 2021–2026 (USD MILLION)

TABLE 132 SOUTH KOREA: FIBER OPTIC CABLES MARKET FOR MILITARY AND AEROSPACE, BY MATERIAL, 2017–2020 (USD MILLION)

TABLE 133 SOUTH KOREA: FIBER OPTIC CABLES MARKET FOR MILITARY AND AEROSPACE, BY MATERIAL, 2021–2026 (USD MILLION)

11.5.7 AUSTRALIA

TABLE 134 AUSTRALIA: FIBER OPTIC CABLES MARKET FOR MILITARY AND AEROSPACE, BY PLATFORM, 2017–2020 (USD MILLION)

TABLE 135 AUSTRALIA: FIBER OPTIC CABLES MARKET FOR MILITARY AND AEROSPACE, BY PLATFORM, 2021–2026 (USD MILLION)

TABLE 136 AUSTRALIA: FIBER OPTIC CABLES MARKET FOR MILITARY AND AEROSPACE, BY TYPE, 2017–2020 (USD MILLION)

TABLE 137 AUSTRALIA: FIBER OPTIC CABLES MARKET FOR MILITARY AND AEROSPACE, BY TYPE, 2021–2026 (USD MILLION)

TABLE 138 AUSTRALIA: FIBER OPTIC CABLES MARKET FOR MILITARY AND AEROSPACE, BY MATERIAL, 2017–2020 (USD MILLION)

TABLE 139 AUSTRALIA: FIBER OPTIC CABLES MARKET FOR MILITARY AND AEROSPACE, BY MATERIAL, 2021–2026 (USD MILLION)

11.5.8 REST OF ASIA PACIFIC

TABLE 140 REST OF ASIA PACIFIC: FIBER OPTIC CABLES MARKET FOR MILITARY AND AEROSPACE, BY PLATFORM, 2017–2020 (USD MILLION)

TABLE 141 REST OF ASIA PACIFIC: FIBER OPTIC CABLES MARKET FOR MILITARY AND AEROSPACE, BY PLATFORM, 2021–2026 (USD MILLION)

TABLE 142 REST OF ASIA PACIFIC: FIBER OPTIC CABLES MARKET FOR MILITARY AND AEROSPACE, BY TYPE, 2017–2020 (USD MILLION)

TABLE 143 REST OF ASIA PACIFIC: FIBER OPTIC CABLES MARKET FOR MILITARY AND AEROSPACE, BY TYPE, 2021–2026 (USD MILLION)

TABLE 144 REST OF ASIA PACIFIC: FIBER OPTIC CABLES MARKET FOR MILITARY AND AEROSPACE, BY MATERIAL, 2017–2020 (USD MILLION)

TABLE 145 REST OF ASIA PACIFIC: FIBER OPTIC CABLES MARKET FOR MILITARY AND AEROSPACE, BY MATERIAL, 2021–2026 (USD MILLION)

11.6 MIDDLE EAST

11.6.1 COVID-19 IMPACT ON MIDDLE EAST

FIGURE 28 MIDDLE EAST: FIBER OPTIC CABLES MARKET FOR MILITARY AND AEROSPACE SNAPSHOT**TABLE 146 MIDDLE EAST: FIBER OPTIC CABLES MARKET FOR MILITARY AND AEROSPACE, BY NATION, 2017–2020 (USD MILLION)****TABLE 147 MIDDLE EAST: FIBER OPTIC CABLES MARKET FOR MILITARY AND AEROSPACE, BY NATION, 2021–2026 (USD MILLION)****TABLE 148 MIDDLE EAST: FIBER OPTIC CABLES MARKET FOR MILITARY AND AEROSPACE, BY PLATFORM, 2017–2020 (USD MILLION)****TABLE 149 MIDDLE EAST: FIBER OPTIC CABLES MARKET FOR MILITARY AND AEROSPACE, BY PLATFORM, 2021–2026 (USD MILLION)****TABLE 150 MIDDLE EAST: FIBER OPTIC CABLES MARKET FOR MILITARY AND AEROSPACE, BY TYPE, 2017–2020 (USD MILLION)****TABLE 151 MIDDLE EAST: FIBER OPTIC CABLES MARKET FOR MILITARY AND AEROSPACE, BY TYPE, 2021–2026 (USD MILLION)****TABLE 152 MIDDLE EAST: FIBER OPTIC CABLES MARKET FOR MILITARY AND AEROSPACE, BY MATERIAL, 2017–2020 (USD MILLION)****TABLE 153 MIDDLE EAST: FIBER OPTIC CABLES MARKET FOR MILITARY AND AEROSPACE, BY MATERIAL, 2021–2026 (USD MILLION)****11.6.2 PESTLE ANALYSIS: MIDDLE EAST****11.6.3 SAUDI ARABIA****TABLE 154 SAUDI ARABIA: FIBER OPTIC CABLES MARKET FOR MILITARY AND AEROSPACE, BY PLATFORM, 2017–2020 (USD MILLION)****TABLE 155 SAUDI ARABIA: FIBER OPTIC CABLES MARKET FOR MILITARY AND AEROSPACE, BY PLATFORM, 2021–2026 (USD MILLION)****TABLE 156 SAUDI ARABIA: FIBER OPTIC CABLES MARKET FOR MILITARY AND AEROSPACE, BY TYPE, 2017–2020 (USD MILLION)****TABLE 157 SAUDI ARABIA: FIBER OPTIC CABLES MARKET FOR MILITARY AND AEROSPACE, BY TYPE, 2021–2026 (USD MILLION)****TABLE 158 SAUDI ARABIA: FIBER OPTIC CABLES MARKET FOR MILITARY AND AEROSPACE, BY MATERIAL, 2017–2020 (USD MILLION)****TABLE 159 SAUDI ARABIA: FIBER OPTIC CABLES MARKET FOR MILITARY AND AEROSPACE, BY MATERIAL, 2021–2026 (USD MILLION)****11.6.4 ISRAEL****TABLE 160 ISRAEL: FIBER OPTIC CABLES MARKET FOR MILITARY AND AEROSPACE, BY PLATFORM, 2017–2020 (USD MILLION)****TABLE 161 ISRAEL: FIBER OPTIC CABLES MARKET FOR MILITARY AND AEROSPACE, BY PLATFORM, 2021–2026 (USD MILLION)****TABLE 162 ISRAEL: FIBER OPTIC CABLES MARKET FOR MILITARY AND AEROSPACE, BY TYPE, 2017–2020 (USD MILLION)**

TABLE 163 ISRAEL: FIBER OPTIC CABLES MARKET FOR MILITARY AND AEROSPACE, BY TYPE, 2021–2026 (USD MILLION)

TABLE 164 ISRAEL: FIBER OPTIC CABLES MARKET FOR MILITARY AND AEROSPACE, BY MATERIAL, 2017–2020 (USD MILLION)

TABLE 165 ISRAEL: FIBER OPTIC CABLES MARKET FOR MILITARY AND AEROSPACE, BY MATERIAL, 2021–2026 (USD MILLION)

11.6.5 UAE

TABLE 166 UAE: FIBER OPTIC CABLES MARKET FOR MILITARY AND AEROSPACE, BY PLATFORM, 2017–2020 (USD MILLION)

TABLE 167 UAE: FIBER OPTIC CABLES MARKET FOR MILITARY AND AEROSPACE, BY PLATFORM, 2021–2026 (USD MILLION)

TABLE 168 UAE: FIBER OPTIC CABLES MARKET FOR MILITARY AND AEROSPACE, BY TYPE, 2017–2020 (USD MILLION)

TABLE 169 UAE: FIBER OPTIC CABLES MARKET FOR MILITARY AND AEROSPACE, BY TYPE, 2021–2026 (USD MILLION)

TABLE 170 UAE: FIBER OPTIC CABLES MARKET FOR MILITARY AND AEROSPACE, BY MATERIAL, 2017–2020 (USD MILLION)

TABLE 171 UAE: FIBER OPTIC CABLES MARKET FOR MILITARY AND AEROSPACE, BY MATERIAL, 2021–2026 (USD MILLION)

11.6.6 REST OF MIDDLE EAST

TABLE 172 REST OF MIDDLE EAST: FIBER OPTIC CABLES MARKET FOR MILITARY AND AEROSPACE, BY PLATFORM, 2017–2020 (USD MILLION)

TABLE 173 REST OF MIDDLE EAST: FIBER OPTIC CABLES MARKET FOR MILITARY AND AEROSPACE, BY PLATFORM, 2021–2026 (USD MILLION)

TABLE 174 REST OF MIDDLE EAST: FIBER OPTIC CABLES MARKET FOR MILITARY AND AEROSPACE, BY TYPE, 2017–2020 (USD MILLION)

TABLE 175 REST OF MIDDLE EAST: FIBER OPTIC CABLES MARKET FOR MILITARY AND AEROSPACE, BY TYPE, 2021–2026 (USD MILLION)

TABLE 176 REST OF MIDDLE EAST: FIBER OPTIC CABLES MARKET FOR MILITARY AND AEROSPACE, BY MATERIAL, 2017–2020 (USD MILLION)

TABLE 177 REST OF MIDDLE EAST: FIBER OPTIC CABLES MARKET FOR MILITARY AND AEROSPACE, BY MATERIAL, 2021–2026 (USD MILLION)

11.7 REST OF THE WORLD

11.7.1 COVID-19 IMPACT ON REST OF THE WORLD

FIGURE 29 REST OF THE WORLD: FIBER OPTIC CABLES MARKET FOR MILITARY AND AEROSPACE SNAPSHOT

TABLE 178 REST OF THE WORLD: FIBER OPTIC CABLES MARKET FOR MILITARY AND AEROSPACE, BY NATION, 2017–2020 (USD MILLION)

TABLE 179 REST OF THE WORLD: FIBER OPTIC CABLES MARKET FOR MILITARY

AND AEROSPACE, BY NATION, 2021–2026 (USD MILLION)

TABLE 180 REST OF THE WORLD: FIBER OPTIC CABLES MARKET FOR MILITARY AND AEROSPACE, BY PLATFORM, 2017–2020 (USD MILLION)

TABLE 181 REST OF THE WORLD: FIBER OPTIC CABLES MARKET FOR MILITARY AND AEROSPACE, BY PLATFORM, 2021–2026 (USD MILLION)

TABLE 182 REST OF THE WORLD: FIBER OPTIC CABLES MARKET FOR MILITARY AND AEROSPACE, BY TYPE, 2017–2020 (USD MILLION)

TABLE 183 REST OF THE WORLD: FIBER OPTIC CABLES MARKET FOR MILITARY AND AEROSPACE, BY TYPE, 2021–2026 (USD MILLION)

TABLE 184 REST OF THE WORLD: FIBER OPTIC CABLES MARKET FOR MILITARY AND AEROSPACE, BY MATERIAL, 2017–2020 (USD MILLION)

TABLE 185 REST OF THE WORLD: FIBER OPTIC CABLES MARKET FOR MILITARY AND AEROSPACE, BY MATERIAL, 2021–2026 (USD MILLION)

11.7.2 PESTLE ANALYSIS: REST OF THE WORLD

11.7.3 LATIN AMERICA

TABLE 186 LATIN AMERICA: FIBER OPTIC CABLES MARKET FOR MILITARY AND AEROSPACE, BY PLATFORM, 2017–2020 (USD MILLION)

TABLE 187 LATIN AMERICA: FIBER OPTIC CABLES MARKET FOR MILITARY AND AEROSPACE, BY PLATFORM, 2021–2026 (USD MILLION)

TABLE 188 LATIN AMERICA: FIBER OPTIC CABLES MARKET FOR MILITARY AND AEROSPACE, BY TYPE, 2017–2020 (USD MILLION)

TABLE 189 LATIN AMERICA: FIBER OPTIC CABLES MARKET FOR MILITARY AND AEROSPACE, BY TYPE, 2021–2026 (USD MILLION)

TABLE 190 LATIN AMERICA: FIBER OPTIC CABLES MARKET FOR MILITARY AND AEROSPACE, BY MATERIAL, 2017–2020 (USD MILLION)

TABLE 191 LATIN AMERICA: FIBER OPTIC CABLES MARKET FOR MILITARY AND AEROSPACE, BY MATERIAL, 2021–2026 (USD MILLION)

11.7.4 AFRICA

TABLE 192 AFRICA: FIBER OPTIC CABLES MARKET FOR MILITARY AND AEROSPACE, BY PLATFORM, 2017–2020 (USD MILLION)

TABLE 193 AFRICA: FIBER OPTIC CABLES MARKET FOR MILITARY AND AEROSPACE, BY PLATFORM, 2021–2026 (USD MILLION)

TABLE 194 AFRICA: FIBER OPTIC CABLES MARKET FOR MILITARY AND AEROSPACE, BY TYPE, 2017–2020 (USD MILLION)

TABLE 195 AFRICA: FIBER OPTIC CABLES MARKET FOR MILITARY AND AEROSPACE, BY TYPE, 2021–2026 (USD MILLION)

TABLE 196 AFRICA: FIBER OPTIC CABLES MARKET FOR MILITARY AND AEROSPACE, BY MATERIAL, 2017–2020 (USD MILLION)

TABLE 197 AFRICA: FIBER OPTIC CABLES MARKET FOR MILITARY AND

AEROSPACE, BY MATERIAL, 2021–2026 (USD MILLION)

12 COMPETITIVE LANDSCAPE

12.1 INTRODUCTION

TABLE 198 KEY DEVELOPMENTS BY LEADING PLAYERS IN FIBER OPTIC CABLES MARKET FOR MILITARY & AEROSPACE (2018- 2021)

12.2 MARKET SHARE ANALYSIS OF LEADING PLAYERS 2020

TABLE 199 DEGREE OF COMPETITION

FIGURE 30 COLLECTIVE REVENUE SHARE OF TOP 5 PLAYERS

12.3 RANK ANALYSIS, 2020

FIGURE 31 REVENUE GENERATED BY MAJOR PLAYERS IN FIBER OPTIC CABLES MARKET FOR MILITARY & AEROSPACE, 2020

TABLE 200 COMPANY REGION FOOTPRINT

TABLE 201 COMPANY PLATFORM FOOTPRINT

TABLE 202 COMPANY APPLICATION FOOTPRINT

12.4 COMPETITIVE EVALUATION QUADRANT

12.4.1 STAR

12.4.2 PERVASIVE

12.4.3 EMERGING LEADER

12.4.4 PARTICIPANT

FIGURE 32 FIBER OPTIC CABLES MARKET FOR MILITARY & AEROSPACE COMPETITIVE LEADERSHIP MAPPING, 2021

12.5 FIBER OPTIC CABLES MARKET FOR MILITARY & AEROSPACE COMPETITIVE LEADERSHIP MAPPING 2021

12.5.1 PROGRESSIVE COMPANIES

12.5.2 RESPONSIVE COMPANIES

12.5.3 STARTING BLOCKS

12.5.4 DYNAMIC COMPANIES

12.6 COMPETITIVE SCENARIO

12.6.1 NEW PRODUCT LAUNCHES

TABLE 203 TAKE NEW PRODUCT LAUNCHES, JANUARY 2018–OCTOBER 2021

12.6.2 DEALS

TABLE 204 DEALS, AUGUST 2018– AUGUST 2021

13 COMPANY PROFILES

13.1 INTRODUCTION

13.2 KEY PLAYERS

(Business Overview, Products/Services/Solutions Offered, MnM View, Key Strengths and Right to Win, Strategic Choices Made, Weaknesses and Competitive Threats, Recent Developments)*

13.2.1 AMPHENOL FSI

TABLE 205 AMPHENOL FSI: BUSINESS OVERVIEW

FIGURE 33 AMPHENOL FSI: COMPANY SNAPSHOT

13.2.2 CARLISLE INTERCONNECT TECHNOLOGIES

TABLE 206 CARLISLE INTERCONNECT TECHNOLOGIES: BUSINESS OVERVIEW

FIGURE 34 CARLISLE INTERCONNECT TECHNOLOGIES: COMPANY SNAPSHOT

13.2.3 RADIALL

TABLE 207 RADIALL: BUSINESS OVERVIEW

FIGURE 35 RADIALL: COMPANY SNAPSHOT

TABLE 208 RADIALL: NEW PRODUCT DEVELOPMENT

TABLE 209 RADIALL: DEALS

13.2.4 TE CONNECTIVITY

TABLE 210 THALES: BUSINESS OVERVIEW

FIGURE 36 TE CONNECTIVITY: COMPANY SNAPSHOT

13.2.5 CORNING OPTICAL COMMUNICATIONS LLC

TABLE 211 CORNING OPTICAL COMMUNICATIONS LLC: BUSINESS OVERVIEW

FIGURE 37 CORNING OPTICAL COMMUNICATIONS LLC: COMPANY SNAPSHOT

TABLE 212 CORNING OPTICAL COMMUNICATIONS LLC: NEW PRODUCT DEVELOPMENT

13.2.6 PRYSMIAN GROUP

TABLE 213 PRYSMIAN GROUP: BUSINESS OVERVIEW

FIGURE 38 PRYSMIAN GROUP: COMPANY SNAPSHOT

TABLE 214 PRYSMIAN GROUP: DEALS

13.2.7 OPTICAL CABLE CORPORATION

TABLE 215 OPTICAL CABLE CORPORATION: BUSINESS OVERVIEW

FIGURE 39 OPTICAL CABLE CORPORATION: COMPANY SNAPSHOT

13.2.8 TIMBERCON

TABLE 216 TIMBERCON: BUSINESS OVERVIEW

TABLE 217 TIMBERCON: DEALS

13.3 OTHER KEY PLAYERS

13.3.1 INTERCONNECT SYSTEMS PTY LTD.

TABLE 218 INTERCONNECT SYSTEMS PTY LTD.: BUSINESS OVERVIEW

13.3.2 W.L. GORE & ASSOCIATES

TABLE 219 W.L. GORE & ASSOCIATES: BUSINESS OVERVIEW

TABLE 220 W.L. GORE & ASSOCIATES: NEW PRODUCT DEVELOPMENT

13.3.3 AFL

TABLE 221 AFL: BUSINESS OVERVIEW

13.3.4 OFS FITEL LLC

TABLE 222 OFS FITEL LLC: BUSINESS OVERVIEW

13.3.5 TECH OPTICS LTD.

TABLE 223 TECH OPTICS LTD.: BUSINESS OVERVIEW

13.3.6 LEVITON MANUFACTURING CO. LTD.

TABLE 224 LEVITON MANUFACTURING CO. LTD.: BUSINESS OVERVIEW

*Business Overview, Products/Services/Solutions Offered, MnM View, Key Strengths and Right to Win, Strategic Choices Made, Weaknesses and Competitive Threats, Recent Developments might not be captured in case of unlisted companies.

14 APPENDIX

14.1 DISCUSSION GUIDE

14.2 KNOWLEDGE STORE: MARKETSandMARKETS' SUBSCRIPTION PORTAL

14.3 AVAILABLE CUSTOMIZATION

14.4 RELATED REPORTS

14.5 AUTHOR DETAILS

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