

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.

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