

Military Antennas Market by Component (Reflectors, Feed Horn, Feed Networks, Low Noise Block Converter (LNB)), Frequency Band (HF, VHF, UHF SHF, AND EHF), End Use (OEM and Aftermarket), Type, Application, Platform and Region – Global Forecast to 2026

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Abstracts

Military antennas market is projected to grow from USD 3.9 billion in 2021 to USD 5.2 billion by 2026, at a CAGR of 5.9% during the forecast period. Military antennas refers any device that converts electronic signals to electromagnetic waves (and vice versa) effectively with minimum loss of signals. Military antennas are more ruggedized than regular commercial antennas to withstand harsh conditions. The military antennas market is expected to grow at a significant rate in the coming years, owing to the adoption of various electronic systems for communication, intelligence, surveillance & reconnaissance (ISR), and command and control in the defense industry. These military systems require antennas for transmitting and receiving data. Antennas should be rugged to withstand harsh environmental conditions. Defense modernization programs and increasing procurement of radar and air defense systems are also expected to fuel the growth of the military antennas market.

Military antennas 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 Military antennas contracts in the last few years. Major focus was given to the contracts and new product development due to increase in the demand for advanced military antenna products and the growth of emerging markets have encouraged companies to adopt this strategy to enter new markets.

Based on component, reflectors segment is estimated to witness the largest share of the military antennas market from 2021 to 2026.

Based on component, reflectors segment of the military antennas market is estimated to hold the dominant market share in 2021. This is due to the innovation in reflector design to decrease the assemble time. Reflectors are integrated into antenna assembly to modify the radiation pattern of the antenna so that the signal gain can be improved in target direction. Various manufacturers are focusing on improving the reflector design so that the assembly time can be decreased.

For instance, in 2021, Airbus selected Ariane Group as the supplier of the satellite antenna reflectors for OneSat, its new satellite product, which is fully reconfigurable in orbit. OneSat will be fitted with the latest generation of ultra-light SPRINT antenna reflectors, which can be assembled in only 11 weeks compared with 24 weeks for ultra-light reflector technology.

Based on frequency band, super-high frequency segment of the military antennas market is projected to witness the largest share in 2021.

Based on frequency band, super-high frequency segment is projected to lead the military antennas market during the forecast period. The growing demand for reliable military satellite communication is primarily driving this segment. The small wavelength of this band permits transmission of narrow beams by aperture antennas such as parabolic dish antennas and horn antennas. This band is used for point-to-point satellite communication and data links. The SHF band is used in airborne radar for airborne ground mapping. This band is used for point-to-point communication and data links. This frequency range is used for most radar transmitters, wireless LANs, satellite communication, microwave radio relay links, and numerous short-range terrestrial data links.

Based on type, array antenna segment is estimated to account for the fastest growth of the military antennas market from 2021 to 2026.

Based on type, array antenna segment of the military antennas market is projected to grow at the highest CAGR during the forecast period. This growth is driven due to Phased-array antenna systems are used in naval and airborne platforms. In 2020, the Defense Innovation Unit (DIU) (US) awarded a contract to ThinkKom Solutions to test and evaluate one of the company's commercial off-the-shelf (COTS) aeronautical

phased-array antenna systems as a solution for next-generation communications on the US Navy ships. Under the seven-month contract, ThinKom delivered a ThinAir Ka2517 antenna system for on-board testing to meet the requirements for multi-domain tactical communications (MDTC) by the US Navy. The Ka-band antenna, based on the company's patented VICTS technology, will demonstrate the capability to be integrated onto a US Navy ship.

Based on platform, ground segment is estimated to account for the largest share of the military antennas market from 2021 to 2026.

Based on platform, ground segment is estimated to account for the largest share of the military antennas during the forecast period. This growth is driven due to need for on-the-walk and on-the-move SATCOM capabilities for voice and data transmission, grounds stations use SATCOM to collect and stream remote sensing satellite data to a variety of users and applications, predominantly use manpack antennas in military operations, and UGVs antennas are used to carry out ground surveillance missions. In 2021, ARLINGTON, Va. FLIR Systems won an additional USD 30.1-million contract from the US Army for sustainment efforts connected to the service's Man Transportable Robotic System Increment II (MTRS Inc. II) and Common Robotic System-Heavy (CRS-H) unmanned ground vehicle (UGV) programs.

Based on application, electronic warfare segment is estimated to account for the fastest growth of the military antennas market from 2021 to 2026.

Based on application, electronic warfare segment of the military antennas market is projected to grow at the highest CAGR during the forecast period. This growth is driven due to incorporation of effective RF technology in various electronic equipment used in military applications. In January 2021, Raytheon Intelligence & Space (Raytheon Technologies business) received a contract worth USD 12.7 million to build a phased array antenna that will reveal new capabilities in the millimeter-wave part of the radiofrequency spectrum for small, mobile platforms such as aircraft. Millimeter-wave is less overcrowded than other parts of the RF spectrum on the battleground.

Based on end use, OEM segment is estimated to account for the largest share of the military antennas market from 2021 to 2026.

Based on end use, OEM segment is estimated to account for the largest share of the military antennas during the forecast period. This growth is driven due to increasing upgradation of military antennas and procurement of military vehicles across the globe.

The OEM segment is expected to lead the market during the forecast period due to the increasing inventory of newly inducted airborne platforms, including unmanned aerial vehicles, fourth-, fifth-, and sixth-generation fighter aircraft, and helicopters. The use of these airborne platforms is increasing in anti-submarine warfare, air-to-ground support, and air defense roles. The development of new missiles such as beyond-visual-range missiles and anti-radiation missiles for newly inducted platforms has further propelled the demand for military antennas.

The Asia Pacific market is projected to contribute the largest share from 2021 to 2026 in the Military antennas market

Based on region, Asia Pacific is expected to lead the Military antennas market from 2021 to 2026 in terms of market share. An increase in the instances of terror attacks in the Asia Pacific region has led countries of the region to enhance their surveillance and anti-terrorism capabilities. In addition, the increase in defense expenditures of India and China, among others, and the expansion of military commands in emerging economies have accelerated the demand for military antennas in the Asia Pacific region. In 2019, Gilat Satellite Networks Ltd, a worldwide leader in satellite networking technology, solutions, and services, and China Satellite Communications Co., Ltd. (China Satcom) announced a strategic partnership to jointly provide advanced satellite communication services for aero, land, and maritime fixed and mobility applications.

In 2021, China launched the Tiantong 1-03 communications satellite, which operates in the S-band frequency, providing mobile communication services. Once in its orbit, the satellite will be networked with Tiantong 1-01 and 1-02 satellites to improve resource efficiency and system service capabilities.

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 Military antennas 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 Military antennas market across various segments and subsegments. It aims at estimating the size and growth potential of this market across different segments based on component, end use, type, application, frequency band, 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 military antennas 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 Military antennas 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 Military antennas market

Market Development: Comprehensive information about lucrative markets – the report analyses the Military antennas market across varied regions

Market Diversification: Exhaustive information about new products, untapped

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Competitive Assessment: In-depth assessment of market shares, growth strategies, products, and manufacturing capabilities of leading players in the Military antennas market

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