

Software Defined Radio Market by Platform (Airborne, Maritime, Land, Space), Application (Government & Defense, Commercial), Component (Hardware, Software), Type, Frequency (Single Band, Multi-Band) and Region - Global Forecast to 2027

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Abstracts

The software defined radio market is projected to grow from USD 10.0 Billion in 2022 to USD 12.5 Billion by 2027, at a CAGR of 4.6% from 2022 to 2027. Rising procurement of modern military tactical communication systems is expected to drive the software defined radio market growth during the forecast period.

Continuously evolving dynamics of the software defined radio (SDR) market are attributed to the changing intergovernmental situations in countries such as North America, Europe, Asia Pacific, the Middle East, Latin America, and Africa.

Growing demand of SDR from telecommunication industry and increasing procurement of next generation military communication system are some factors that are expected to boost the growth of SDR market during the projection period.

Government authorities in multiple developed and developing countries across the globe are continuously focusing on their military spending, including the procurement of technologically advanced products. Countries like the US, France, Russia, and Israel have majorly focused on gaining an edge in the military and defense manufacturing sectors. However, there could be a shift in global economic power towards Asia, wherein countries like China, India, and South Korea have enhanced their military spending in recent years. China is one of the major defense spenders in the world. With the emergence of China as a strong player in the military & defense sector, neighboring countries, including India, Vietnam, and Japan, are also focusing on increasing their

military spending. These countries, along with the US, have high defense budgets to enhance their border and national security. For instance, in November 2019, L3Harris Technologies, Inc. was awarded a contract worth over USD 86 million by the US Special Operations Command (USSOCOM) to supply tactical radios. Elbit Systems was awarded a contract worth over USD 200 million in October 2019 by the Swiss army for the supply of radio communication systems. Such contracts will, in turn, drive the software defined radio market during the forecast period.

Based on platform, the land segment is expected to lead market with largest share in 2022

Based on platform, the software-defined radio market has been segmented into airborne, maritime, land, and space. The increasing requirement for secure and jam-free communication in the defense sector has led to the growth of the software-defined radio (SDR) market. SDR finds a number of distinct applications in multiple sectors, such as military, public safety, and telecommunications. SDR is an advanced technology that helps accelerate the expansion of multi-service, multi-featured, and multi-band radio equipment.

SDR allows single wireless equipment to support a broad range of capabilities that were previously available by integrating several radio components. The initial focus of industry players during the manufacturing of SDRs is on developing a multi-purpose device. A single software-defined radio device could provide cellular connectivity, offer GPS position location service, act as an AM/FM receiver, connect with wireless data networks, and function as an HDTV receiver. It offers the upgradeability and flexibility required to satisfy the users' needs by enabling the instantaneous operation of numerous standards on a single hardware device. This technology also supports software RAN solutions, which allow cellular operators to support several standards simultaneously on a single hardware platform that includes shared RF equipment along with backhaul transport. The SDR market is growing at a significant rate in North America and Asia Pacific, owing to the increased manufacturing facilities of communication systems and electronic platforms in these regions. The US, China, Japan, South Korea, and India are some of the major hubs of communication systems and electronic platforms manufacturing.

Based on Application, government & Defense segment registered largest share in base year

Based on application, the software-defined radio market has been segmented into

government & defense and commercial. The government & defense segment accounted for a larger share of the software-defined radio market owing to the modernization of military communications and the implementation of tactical communication systems. In the current scenario, defense communication systems are going through a major transformation, with numerous technological advancements being made by market players to cater to the dynamic needs of defense forces.

Software-defined radio relies on typical hardware components that are implemented in software and networked communications technology to provide a shared awareness of the battlespace to defense forces. Defense experts say that a shared awareness increases synergy for command and control, resulting in superior decision-making and the ability to coordinate complex defense operations over long distances for an overwhelming war-fighting advantage. Software-defined radio is highly dependent on the interoperability of communications equipment, data, and software to enable the networking of people, sensors, and manned and unmanned platforms.

The North America region dominated the market with largest share in 2022

North America is estimated to account for the major share (37.3%) of the software-defined radio market. The presence of leading SDR manufacturers in the US such as Northrop Grumman Corporation (US), L3Harris Technologies, Inc. (US), Raytheon Technologies Corporation (US), General Dynamics Corporation (US), National Instruments (US), and FlexRadio (US) are supporting the SDR market growth in the North America. The US holds major share in North America in 2021. The increasing need to minimize the complexity of mobile communication systems and improve security in networking, along with the requirement for jam-free and error free communications, will help to expand the SDR market size in the US. For instance, in November 2020, the Intelligence Advanced Research Projects Agency (IARPA) made an announcement (IARPA-BAA-20-03) for securing information through the smart radio systems (SCISRS) program. Industry players in the US are engaged in launching and developing new products and technologies to boost their portfolio and gain a competitive edge over their competitors. For instance, in April 2019, BAE Systems showcased a software-defined radio assembly allowing customers to engage their spacecraft for various space missions.

The break-up of the profiles of primary participants in the Software Defined Radio Market is as follows:

By Company Type: Tier 1–32%; Tier 2–40%; and Tier 3–28%

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

By Region: North America–37.32%; Europe–21.58%; Asia Pacific–29.26%;
Middle East–5.60%; Latin America–4.20%; and Africa–2.05%

Major players in the software defined radio market are L3Harris Technologies, Inc. (US), Raytheon Technologies Corporation (US), Northrop Grumman Corporation (US), General Dynamics Corporation (US), and Thales Group (France). These companies adopted strategies including product development and service launches, contracts, partnerships, agreements, and expansions to sustain their position in the market. Also focusing on expanding distribution networks in the defense and commercial business across North America, Europe, Asia Pacific and other regions in turn driving the demand for SDR.

Research Coverage

This research report categorizes the software defined radio market into platform, application, component, type, frequency and region. Based on platform the market is divided into airborne, maritime, land, and space. On the basis of application, the market is fragmented into government & defense and commercial. By component, the market is classified into hardware and software. Based on type, the market is divided into general purpose radio, joint tactical radio system (JTRS), cognitive/intelligent radio, and terrestrial trunked radio (TETRA). By frequency, the software defined radio market is segmented into single band frequency and multi band frequency. The software defined radio market has been studied for North America, Europe, Asia Pacific, Middle East, Latin America, and Africa.

The scope of the report covers detailed information regarding the major factors, such as drivers, restraints, challenges, and opportunities, influencing the growth of the software defined radio market. A detailed analysis of the key industry players has been done to provide insights into their business overviews; solutions and services; key strategies; contracts, joint ventures, partnerships & agreements, acquisitions, and new product launches associated with the software defined radio market. Competitive analysis of upcoming startups in the software defined radio market ecosystem is covered in this report.

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 Software Defined Radio Market and its segments. This study is also expected to provide region wise information about the end-use industrial sectors, wherein Software Defined Radio is 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.

The report provides insights on the following pointers:

Market Penetration: Comprehensive information on software defined radio 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 software defined radio market

Market Development: Comprehensive information about lucrative markets – the report analyzes the software defined radio market across varied regions

Market Diversification: Exhaustive information about new products, untapped geographies, recent developments, and investments in the software defined radio market

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

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FIGURE 83 ULTRA: COMPANY SNAPSHOT

TABLE 259 ULTRA: PRODUCTS/SOLUTIONS/SERVICES OFFERED

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14.3.1 BARRETT COMMUNICATIONS PTY LTD.

TABLE 260 BARRETT COMMUNICATION PTY LTD.: COMPANY OVERVIEW

14.3.2 NXP SEMICONDUCTORS N.V.

TABLE 261 NXP SEMICONDUCTORS N.V.: COMPANY OVERVIEW

14.3.3 PENTEK INC.

TABLE 262 PENTEK INC.: COMPANY OVERVIEW

14.3.4 BITTIUM CORPORATION

TABLE 263 BITTIUM CORPORATION: COMPANY OVERVIEW

14.3.5 RAFAEL ADVANCED DEFENSE SYSTEMS LTD.

TABLE 264 RAFAEL ADVANCED DEFENSE SYSTEMS LTD.: COMPANY OVERVIEW

14.3.6 ASTRA RAFAEL COMSYS PVT. LTD.

TABLE 265 ASTRA RAFAEL COMSYS PVT. LTD.: COMPANY OVERVIEW

14.3.7 BHARAT ELECTRONICS LIMITED

TABLE 266 BHARAT ELECTRONICS LIMITED: COMPANY OVERVIEW

14.3.8 ROLTA INDIA LIMITED

TABLE 267 ROLTA INDIA LIMITED: COMPANY OVERVIEW

14.3.9 SAANKHYA LABS PVT. LTD.

TABLE 268 SAANKHYA LABS PVT. LTD.: COMPANY OVERVIEW

14.3.10 INNTOT TECHNOLOGIES PVT. LTD.

TABLE 269 INNTOT TECHNOLOGIES PVT. LTD: COMPANY OVERVIEW

*Details on Business overview, Products/Services/Solutions offered, Recent developments, MnM view, Right to win, Strategic choices made, and Weaknesses and competitive threats might not be captured in case of unlisted companies.

15 APPENDIX

15.1 DISCUSSION GUIDE

15.2 KNOWLEDGESTORE: MARKETSandMARKETS' SUBSCRIPTION PORTAL

15.3 CUSTOMIZATION OPTIONS

15.4 RELATED REPORTS

15.5 AUTHOR DETAILS

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