

Multi-mode Receiver Market Forecasts to 2032 – Global Analysis By Platform (Fixed-wing Aircraft, Rotary-wing Aircraft, and Other Platforms), Fit Type, Component, Frequency Range, Sub-System, End User and By Geography

<https://marketpublishers.com/r/M9C14FDE2977EN.html>

Date: October 2025

Pages: 200

Price: US\$ 4,150.00 (Single User License)

ID: M9C14FDE2977EN

Abstracts

According to Statistics MRC, the Global Multi-mode Receiver Market is accounted for \$1.63 billion in 2025 and is expected to reach \$2.49 billion by 2032 growing at a CAGR of 6.2% during the forecast period. A multi-mode receiver is a versatile device capable of detecting and interpreting signals from different communication modes, including analog, digital, or varied frequency ranges. It allows users to switch between multiple signal types without needing separate receivers for each mode. Commonly employed in wireless networks, radio systems, and telecommunications, these receivers improve operational efficiency and adaptability, supporting various standards and protocols in one unit, which lowers costs and streamlines the integration of communication systems.

Market Dynamics:

Driver:

Rising air traffic and fleet expansion

Multi-mode receivers (MMRs) are increasingly integrated into new aircraft to support seamless communication, navigation, and surveillance. As airspace becomes more congested, precision-based navigation technologies are essential for route optimization and safety. Emerging trends include the adoption of satellite-based augmentation systems (SBAS) and performance-based navigation (PBN) protocols. OEMs are embedding MMRs into next-gen avionics suites to meet evolving regulatory and

operational requirements. The growth of commercial aviation in emerging economies is further accelerating MMR deployment across fixed-wing platforms.

Restraint:

Cost and complexity of retrofitting older aircraft

Retrofitting often requires extensive rewiring, software integration, and certification, which can disrupt fleet operations. Older platforms may lack the modular architecture needed to accommodate modern avionics, increasing installation time and cost. Regulatory compliance adds another layer of complexity, especially when integrating GNSS, ILS, and SBAS capabilities. Smaller carriers and regional operators face budget constraints that limit retrofit feasibility. These barriers slow market penetration in aging fleets, despite the operational benefits of MMR technology.

Opportunity:

Demand for space-saving and lightweight systems

Multi-mode receivers are evolving with miniaturized components and integrated functionalities, enabling streamlined cockpit configurations. Advances in chip design and modular packaging are making MMRs more adaptable to diverse aircraft types, including UAVs and eVTOLs. The push for sustainable aviation is encouraging the use of low-power, high-performance systems. Emerging trends include multifunctional receivers that combine GNSS, VOR, and DME in a single unit. These innovations are unlocking new opportunities in both commercial and defense aviation segments.

Threat:

Vulnerability to GNSS spoofing and jamming

GNSS jamming incidents have been reported near conflict zones and high-traffic corridors, raising concerns about operational safety. Manufacturers are investing in anti-jam technologies and resilient receiver architectures to mitigate these threats. Regulatory bodies are mandating robustness standards for avionics systems operating in contested environments. Emerging solutions include multi-frequency GNSS support and integration with inertial navigation systems (INS) for redundancy. Despite these efforts, persistent vulnerabilities could impact adoption in sensitive applications like military and emergency response.

Covid-19 Impact:

The pandemic disrupted aircraft production and delayed avionics upgrades due to supply chain bottlenecks and reduced capital expenditure. Lockdowns and travel restrictions led to a temporary decline in commercial aviation, slowing MMR installations. However, the crisis accelerated digital transformation, with airlines adopting remote diagnostics and predictive maintenance tools. Regulatory agencies introduced flexible certification pathways to support avionics modernization during recovery. Post-Covid strategies now emphasize automation, modularity, and cyber-resilience in avionics systems.

The fixed-wing aircraft segment is expected to be the largest during the forecast period

The fixed-wing aircraft segment is expected to account for the largest market share during the forecast period. These platforms require robust navigation systems for long-haul operations, making MMRs a critical component. Technological advancements in integrated flight decks and satellite navigation are reinforcing demand. Fixed-wing aircraft benefit from standardized avionics architectures, simplifying MMR integration. Key developments include the use of SBAS-enabled receivers for precision approach and landing. As fleet modernization accelerates globally, fixed-wing platforms remain the primary deployment base for multi-mode receivers.

The automotive segment is expected to have the highest CAGR during the forecast period

Over the forecast period, the automotive segment is predicted to witness the highest growth rate. Increasing adoption of GNSS-based navigation in autonomous and connected vehicles is driving demand. MMRs are being tailored for vehicular applications with enhanced positioning accuracy and multi-constellation support. Emerging trends include integration with ADAS, V2X communication, and real-time traffic management systems. Lightweight, low-power receivers are enabling deployment in electric and hybrid vehicles. As smart mobility gains traction, automotive-grade MMRs are becoming essential for next-gen transportation infrastructure.

Region with largest share:

During the forecast period, the Asia Pacific region is expected to hold the largest market share, driven by rapid aviation growth and infrastructure investments. Countries like

China, India, and Japan are expanding their commercial and defense fleets, boosting avionics demand. Regional OEMs are collaborating with global suppliers to localize production and enhance technology access. Government initiatives supporting GNSS modernization and SBAS deployment are accelerating receiver adoption. The rise of low-cost carriers and regional connectivity programs is further fueling market expansion.

Region with highest CAGR:

Over the forecast period, the North America region is anticipated to exhibit the highest CAGR, supported by advanced R&D and regulatory agility. The U.S. and Canada are pioneering resilient navigation technologies for both civil and defense applications. Key developments include integration of MMRs with next-gen air traffic management systems and unmanned platforms. Regulatory bodies like the FAA are streamlining certification for multi-frequency GNSS and SBAS-enabled receivers. The region benefits from strong OEM presence and early adoption of cyber-resilient avionics.

Key players in the market

Some of the key players in Multi-mode Receiver Market include BAE Systems, Cobham plc, Honeywell International Inc., Northrop Grumman Corporation, Thales Group, Raytheon Technologies Corporation, Collins Aerospace, VAL Avionics Ltd., Garmin Ltd., Trimble Inc., Leonardo S.p.A., Systems Interface Ltd., Saab AB, Intelcan Technosystems Inc., and Indra Sistemas S.A.

Key Developments:

In October 2025, BAE Systems signs agreement with Rheinmetall for CV90120 advanced gun upgrade. BAE Systems H?gglunds is teaming up with Rheinmetall Weapon and Ammunition to integrate the 120mm L44A1 Low Recoil (LR) weapon system onto the latest CV90120 vehicle, leveraging the expertise and capabilities of two leading European defense companies to deliver a tailored solution to meet the evolving demands of the battlefield.

In September 2025, Honeywell announced that, in connection with the previously announced spin-off of Solstice Advanced Materials Inc. from Honeywell, Solstice has commenced a private offering of \$1 billion aggregate principal amount of senior notes due 2033. The precise size, timing and terms of the Notes offering are subject to market conditions and other factors.

Platforms Covered:

Fixed-wing Aircraft

Rotary-wing Aircraft

Other Platforms

Fit Types Covered:

Line-Fit

Retrofit

Components Covered:

Multi-mode Transceivers

Low-Noise Amplifiers

Antennas

Mixers

Power Amplifiers

Frequency Ranges Covered:

Below 6 GHz

6–12 GHz

12–48 GHz

48–192 GHz

Sub-Systems Covered:

Instrument Landing System (ILS)

Microwave Landing System (MLS)

Ground-based Augmentation System (GBAS)

Distance Measuring Equipment (DME)

Very High Frequency Omnidirectional Range (VOR)

End Users Covered:

Aerospace & Defense

Geospatial & Surveying

Telecommunications

Automotive

Other End Users

Regions Covered:

North America

US

Canada

Mexico

Europe

Germany

UK

Italy

France

Spain

Rest of Europe

Asia Pacific

Japan

China

India

Australia

New Zealand

South Korea

Rest of Asia Pacific

South America

Argentina

Brazil

Chile

Rest of South America

Middle East & Africa

Saudi Arabia

UAE

Qatar

South Africa

Rest of Middle East & Africa

What our report offers:

- Market share assessments for the regional and country-level segments
- Strategic recommendations for the new entrants
- Covers Market data for the years 2024, 2025, 2026, 2028, and 2032
- Market Trends (Drivers, Constraints, Opportunities, Threats, Challenges, Investment Opportunities, and recommendations)
- Strategic recommendations in key business segments based on the market estimations
- Competitive landscaping mapping the key common trends
- Company profiling with detailed strategies, financials, and recent developments
- Supply chain trends mapping the latest technological advancements

Free Customization Offerings:

All the customers of this report will be entitled to receive one of the following free customization options:

Company Profiling

Comprehensive profiling of additional market players (up to 3)

SWOT Analysis of key players (up to 3)

Regional Segmentation

Market estimations, Forecasts and CAGR of any prominent country as per the client's interest (Note: Depends on feasibility check)

Competitive Benchmarking

Benchmarking of key players based on product portfolio, geographical presence, and strategic alliances

Contents

1 EXECUTIVE SUMMARY

2 PREFACE

- 2.1 Abstract
- 2.2 Stake Holders
- 2.3 Research Scope
- 2.4 Research Methodology
 - 2.4.1 Data Mining
 - 2.4.2 Data Analysis
 - 2.4.3 Data Validation
 - 2.4.4 Research Approach
- 2.5 Research Sources
 - 2.5.1 Primary Research Sources
 - 2.5.2 Secondary Research Sources
 - 2.5.3 Assumptions

3 MARKET TREND ANALYSIS

- 3.1 Introduction
- 3.2 Drivers
- 3.3 Restraints
- 3.4 Opportunities
- 3.5 Threats
- 3.6 End User Analysis
- 3.7 Emerging Markets
- 3.8 Impact of Covid-19

4 PORTERS FIVE FORCE ANALYSIS

- 4.1 Bargaining power of suppliers
- 4.2 Bargaining power of buyers
- 4.3 Threat of substitutes
- 4.4 Threat of new entrants
- 4.5 Competitive rivalry

5 GLOBAL MULTI-MODE RECEIVER MARKET, BY PLATFORM

- 5.1 Introduction
- 5.2 Fixed-wing Aircraft
- 5.3 Rotary-wing Aircraft
- 5.4 Other Platforms

6 GLOBAL MULTI-MODE RECEIVER MARKET, BY FIT TYPE

- 6.1 Introduction
- 6.2 Line-Fit
- 6.3 Retrofit

7 GLOBAL MULTI-MODE RECEIVER MARKET, BY COMPONENT

- 7.1 Introduction
- 7.2 Multi-mode Transceivers
- 7.3 Low-Noise Amplifiers
- 7.4 Antennas
- 7.5 Mixers
- 7.6 Power Amplifiers

8 GLOBAL MULTI-MODE RECEIVER MARKET, BY FREQUENCY RANGE

- 8.1 Introduction
- 8.2 Below 6 GHz
- 8.3 6–12 GHz
- 8.4 12–48 GHz
- 8.5 48–192 GHz

9 GLOBAL MULTI-MODE RECEIVER MARKET, BY SUB-SYSTEM

- 9.1 Introduction
- 9.2 Instrument Landing System (ILS)
- 9.3 Microwave Landing System (MLS)
- 9.4 Ground-based Augmentation System (GBAS)
- 9.5 Distance Measuring Equipment (DME)
- 9.6 Very High Frequency Omnidirectional Range (VOR)

10 GLOBAL MULTI-MODE RECEIVER MARKET, BY END USER

- 10.1 Introduction
- 10.2 Aerospace & Defense
- 10.3 Geospatial & Surveying
- 10.4 Telecommunications
- 10.5 Automotive
- 10.6 Other End Users

11 GLOBAL MULTI-MODE RECEIVER MARKET, BY GEOGRAPHY

- 11.1 Introduction
- 11.2 North America
 - 11.2.1 US
 - 11.2.2 Canada
 - 11.2.3 Mexico
- 11.3 Europe
 - 11.3.1 Germany
 - 11.3.2 UK
 - 11.3.3 Italy
 - 11.3.4 France
 - 11.3.5 Spain
 - 11.3.6 Rest of Europe
- 11.4 Asia Pacific
 - 11.4.1 Japan
 - 11.4.2 China
 - 11.4.3 India
 - 11.4.4 Australia
 - 11.4.5 New Zealand
 - 11.4.6 South Korea
 - 11.4.7 Rest of Asia Pacific
- 11.5 South America
 - 11.5.1 Argentina
 - 11.5.2 Brazil
 - 11.5.3 Chile
 - 11.5.4 Rest of South America
- 11.6 Middle East & Africa
 - 11.6.1 Saudi Arabia
 - 11.6.2 UAE
 - 11.6.3 Qatar

11.6.4 South Africa

11.6.5 Rest of Middle East & Africa

12 KEY DEVELOPMENTS

12.1 Agreements, Partnerships, Collaborations and Joint Ventures

12.2 Acquisitions & Mergers

12.3 New Product Launch

12.4 Expansions

12.5 Other Key Strategies

13 COMPANY PROFILING

13.1 BAE Systems

13.2 Cobham plc

13.3 Honeywell International Inc.

13.4 Northrop Grumman Corporation

13.5 Thales Group

13.6 Raytheon Technologies Corporation

13.7 Collins Aerospace

13.8 VAL Avionics Ltd.

13.9 Garmin Ltd.

13.10 Trimble Inc.

13.11 Leonardo S.p.A.

13.12 Systems Interface Ltd.

13.13 Saab AB

13.14 Intelcan Technosystems Inc.

13.15 Indra Sistemas S.A.

List Of Tables

LIST OF TABLES

- Table 1 Global Multi-mode Receiver Market Outlook, By Region (2024-2032) (\$MN)
- Table 2 Global Multi-mode Receiver Market Outlook, By Platform (2024-2032) (\$MN)
- Table 3 Global Multi-mode Receiver Market Outlook, By Fixed-wing Aircraft (2024-2032) (\$MN)
- Table 4 Global Multi-mode Receiver Market Outlook, By Rotary-wing Aircraft (2024-2032) (\$MN)
- Table 5 Global Multi-mode Receiver Market Outlook, By Other Platforms (2024-2032) (\$MN)
- Table 6 Global Multi-mode Receiver Market Outlook, By Fit Type (2024-2032) (\$MN)
- Table 7 Global Multi-mode Receiver Market Outlook, By Line-Fit (2024-2032) (\$MN)
- Table 8 Global Multi-mode Receiver Market Outlook, By Retrofit (2024-2032) (\$MN)
- Table 9 Global Multi-mode Receiver Market Outlook, By Component (2024-2032) (\$MN)
- Table 10 Global Multi-mode Receiver Market Outlook, By Multi-mode Transceivers (2024-2032) (\$MN)
- Table 11 Global Multi-mode Receiver Market Outlook, By Low-Noise Amplifiers (2024-2032) (\$MN)
- Table 12 Global Multi-mode Receiver Market Outlook, By Antennas (2024-2032) (\$MN)
- Table 13 Global Multi-mode Receiver Market Outlook, By Mixers (2024-2032) (\$MN)
- Table 14 Global Multi-mode Receiver Market Outlook, By Power Amplifiers (2024-2032) (\$MN)
- Table 15 Global Multi-mode Receiver Market Outlook, By Frequency Range (2024-2032) (\$MN)
- Table 16 Global Multi-mode Receiver Market Outlook, By Below 6 GHz (2024-2032) (\$MN)
- Table 17 Global Multi-mode Receiver Market Outlook, By 6–12 GHz (2024-2032) (\$MN)
- Table 18 Global Multi-mode Receiver Market Outlook, By 12–48 GHz (2024-2032) (\$MN)
- Table 19 Global Multi-mode Receiver Market Outlook, By 48–192 GHz (2024-2032) (\$MN)
- Table 20 Global Multi-mode Receiver Market Outlook, By Sub-System (2024-2032) (\$MN)
- Table 21 Global Multi-mode Receiver Market Outlook, By Instrument Landing System (ILS) (2024-2032) (\$MN)
- Table 22 Global Multi-mode Receiver Market Outlook, By Microwave Landing System (MLS) (2024-2032) (\$MN)

Table 23 Global Multi-mode Receiver Market Outlook, By Ground-based Augmentation System (GBAS) (2024-2032) (\$MN)

Table 24 Global Multi-mode Receiver Market Outlook, By Distance Measuring Equipment (DME) (2024-2032) (\$MN)

Table 25 Global Multi-mode Receiver Market Outlook, By Very High Frequency Omnidirectional Range (VOR) (2024-2032) (\$MN)

Table 26 Global Multi-mode Receiver Market Outlook, By End User (2024-2032) (\$MN)

Table 27 Global Multi-mode Receiver Market Outlook, By Aerospace & Defense (2024-2032) (\$MN)

Table 28 Global Multi-mode Receiver Market Outlook, By Geospatial & Surveying (2024-2032) (\$MN)

Table 29 Global Multi-mode Receiver Market Outlook, By Telecommunications (2024-2032) (\$MN)

Table 30 Global Multi-mode Receiver Market Outlook, By Automotive (2024-2032) (\$MN)

Table 31 Global Multi-mode Receiver Market Outlook, By Other End Users (2024-2032) (\$MN)

Note: Tables for North America, Europe, APAC, South America, and Middle East & Africa Regions are also represented in the same manner as above.

I would like to order

Product name: Multi-mode Receiver Market Forecasts to 2032 – Global Analysis By Platform (Fixed-wing Aircraft, Rotary-wing Aircraft, and Other Platforms), Fit Type, Component, Frequency Range, Sub-System, End User and By Geography

Product link: <https://marketpublishers.com/r/M9C14FDE2977EN.html>

Price: US\$ 4,150.00 (Single User License / Electronic Delivery)

If you want to order Corporate License or Hard Copy, please, contact our Customer Service:

info@marketpublishers.com

Payment

To pay by Credit Card (Visa, MasterCard, American Express, PayPal), please, click button on product page <https://marketpublishers.com/r/M9C14FDE2977EN.html>