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Airborne Pods Market by Aircraft Type (Combat Aircraft, Helicopter, UAV, and Others), by Pod Type (ISR, Targeting, Self-Protection/Countermeasure, and Others), by Enclosure Type (Composite and Metal), by Sensor Type (EO/IR, EW/EA, IRCM, and Others), by Range Type (Short, Intermediate, and Long), and by Region (North America, Europe, Asia-Pacific, and Rest of the World), Trend, Forecast, Competitive Analysis, and Growth Opportunity: 2018-2023

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Abstracts

This report, from Stratview Research, studies the airborne pods market over the trend period of 2012 to 2017 and forecast period of 2018 to 2023. The report provides detailed insights into the market dynamics to enable informed business decision making and growth strategy formulation based on the opportunities present in the market.

The Global Airborne Pods Market: Highlights

Airborne pods refer to an external pod structure, which is designed to provide a better aerial detection, recognition, identification, targeting, communication, data linking, and self-defensive capabilities to an aircraft. It is used to convert a normal aircraft into a warfare or surveillance aircraft. Previously, systems and components of these pods were individually used in different sections of an aircraft. For instance; camera, radars, and sensors could be equipped in wings, fuselage, or the nose of the cockpit of an aircraft, whereas sensors, radars, and their components, are used separately in some warfare helicopters, such as Apache and Black Hawk.

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In an airborne pod, there are many components including data link systems, sensors, radars, environment cooling system, and modem assembly that help an aircraft to overcome the problems and difficulties, such as detecting, recognizing, and aiming a target in different ranges. Every component inside a pod has its own importance, such as data link system provides real-time data linking from air-to-air, air-to-ground, and air-to-water operations in different ranges where range depends upon a lot of factors, such as size and lenses of camera and sensors. The communication system offers the capability of clear and real-time communication between an aircraft and the base. Environment cooling system keeps the atmosphere cool inside the pod when it gets heated due to fast processing of systems and high-speed of aircraft, especially in the combat aircraft, at higher altitudes. It is very necessary for a sensor or camera lenses to withstand at required atmosphere for clear image processing.

Previously, metals, such as aluminum and steel, were mainly used to manufacture airborne pods. But, due to their higher weight and significant maintenance cost, the industry has started shifting towards composite materials. In the last few decades, composite materials have become the perennial choice in fabricating components and structure of pods as the materials not only offer the advantages of lightweight and high strength-to-weight ratio, but also improve the overall pod aesthetics. The modernized aircraft pod design is rich in composites with reduced aerodynamic drag, due to its smooth airflow design. This further helps in carrying more components inside a pod, due to its lightweight and more cabin space inside the pod. This, in turn, helps the manufactures to offer multi-functionality in single pod.

The global airborne pods market is projected to grow at a healthy rate over the next five years to reach US$ 3,167.9 million in 2023. Growing military expenditure, especially in the developing economies including China and India, an emergence of ISR due to security reasons, an increasing demand for advanced targeting systems, and rising military aircraft upgrade are the major growth factors that are burgeoning the demand for airborne pods in various countries. Asia-Pacific and North America are the biggest demand generators with a current combined share of more than two-third of the total airborne pods market.

The global airborne pods market is segmented based on the aircraft type as Combat Aircraft, Helicopter, UAV, and Others. Combat aircraft and UAVs are likely to remain the growth engines of the market during the forecast period. Rising global tension is compelling various countries to rapidly upgrade their defense capabilities in order to protect themselves from uncertainty and to further solidify their borders. Major developed markets, such as the USA, freeze very high defense budget with a purpose

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to remain the leading market and to provide the highest security to their civilians, whereas developing economies, such as China, Saudi Arabia, and India, are continuously increasing their defense budgets to quickly advance their existing defense capabilities. This is primarily driving the demand for airborne pods in the combat aircraft and UAV segments in the coming years. Additional drivers are emergence of ISR, rising demand for better targeting systems, and an increasing demand for lightweight pods, which are acting as the catalyst to the overall demand for airborne pods in these segments.

Based on the pod type, the market is bifurcated into Intelligence, Surveillance, & Reconnaissance (ISR), Targeting, Self-Protection/Countermeasure, and Others. ISR is likely to remain the most dominant segment of the global airborne pods market over the next five years. ISR pod offers a wide array of advantages, such as precise identification, detection, and recognition of targets. It also converts a normal combat aircraft or a helicopter to a surveillance and reconnaissance aircraft/helicopter by adding such features to it. Its capability is based on the sensors which are situated inside the pod. The larger the sensor and lenses of the camera, the larger the range of the pod. Whereas, targeting pods are likely to be the fastest-growing segment of the global airborne pods market, mainly driven by increasing military aircraft procurement and upgradation of the existing fleet of military aircraft across the world.

Based on the enclosure type, the market is segmented into Composite Pods and Metal Pods. Composite enclosure is likely to remain the more dominant and faster-growing segment of the airborne pods market during the forecast period. It provides numerous advantages over its counterpart (metal pods), such as good product performance, low maintenance cost, and excellent corrosion resistance. Composite enclosure further helps in reducing the aerodynamic drag due to its smooth structure. It is expected that there would be a continuous shift from metal enclosures to composite enclosures in the coming years.

Based on the sensor type, the market is segmented into Electro-Optical (EO)/ Infrared (IR), Electronic Warfare (EW)/Electronic Attack (EA), Infrared Countermeasure (IRCM), and Others. The EO/IR segment is projected to maintain its dominance in the market over the next five years. Increasing demand for ISR pods and rising emergence of ISR due to security reasons are the major growth drivers of EO/IR sensors in the global airborne pods market. Electronic warfare/electronic attack (EW/EA) sensors are likely to be the fastest-growing segment of the global airborne pods market during the forecast period 2018-2023.

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Based on regions, North America is projected to remain the largest market during the forecast period. The USA is the growth engine of the region's market and has the largest fleet of combat aircraft across the world. Rising military aircraft fleet size with a high focus on their upgrade is likely to further boost the overall demand for airborne pods in the region in the foreseeable future. Additionally, all the major pod manufacturers are located in the region to support the defense department and OEMs, helping the country to own more advanced airborne pods.

Asia-Pacific is likely to witness the highest growth during the same period, driven by a host of factors including increasing defense budget of China, India, and South Korea, continuous upgrade of existing aircraft fleet, and higher investment in developing and procuring UAVs, due to rising tensions in different parts of the region.

The supply chain of this market comprises raw material suppliers, pod manufacturers, tier-1 players, and end-users. The key airborne pod companies are Thales Group, Lockheed Martin Corporation, UTC Aerospace Systems, Northrop Grumman Corporation, Raytheon Company, Harris Corporation, S.G.D. Engineering Ltd., Airborne Technologies, Ultra Electronics Holdings PLC, CPI Aerostructures, Rafael Advanced Defense Systems Ltd., and SAAB AB. Development of advanced pods and formation of long-term contracts are some of the most common strategies adopted by the major players in order to remain competitive in the market.

RESEARCH METHODOLOGY

This report offers high-quality insights and is the outcome of detailed research methodology comprising extensive secondary research, rigorous primary interviews with industry stakeholders and validation and triangulation with Stratview Research's internal database and statistical tools. More than 700 authenticated secondary sources, such as company annual reports, fact book, press release, journals, investor presentation, white papers, patents, and articles have been leveraged to gather the data. We conducted more than 15 detailed primary interviews with the market players across the value chain in all four regions and industry experts to obtain both qualitative and quantitative insights.

REPORT FEATURES

This report provides market intelligence in the most comprehensive way. The report structure has been kept such that it offers maximum business value. It provides critical insights into the market dynamics and will enable strategic decision making for the

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existing market players as well as those willing to enter the market. The following are the key features of the report:

- Market structure: Overview, industry life cycle analysis, supply chain analysis
- Market environment analysis: Growth drivers and constraints, Porter's five forces analysis, SWOT analysis
- Market trend and forecast analysis
- Market segment trend and forecast
- Competitive landscape and dynamics: Market share, Product portfolio, New product launches, etc.
- Attractive market segments and associated growth opportunities
- Emerging trends
- Strategic growth opportunities for the existing and new players
- Key success factors

The global airborne pods market is segmented into the following categories.

- Combat Aircraft (Regional Analysis: North America, Europe, Asia-Pacific, and RoW)
- Helicopter (Regional Analysis: North America, Europe, Asia-Pacific, and RoW)
- UAV (Regional Analysis: North America, Europe, Asia-Pacific, and RoW)
- Others (Regional Analysis: North America, Europe, Asia-Pacific, and RoW)

Airborne Pods Market, By Pod Type

- ISR (Regional Analysis: North America, Europe, Asia-Pacific, and RoW)

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Targeting (Regional Analysis: North America, Europe, Asia-Pacific, and RoW)

Self-Protection/Countermeasure (Regional Analysis: North America, Europe, Asia-Pacific, and RoW)

Others (Regional Analysis: North America, Europe, Asia-Pacific, and RoW)

Airborne Pods Market, By Enclosure Type

Composite (Regional Analysis: North America, Europe, Asia-Pacific, and RoW)

Metal (Regional Analysis: North America, Europe, Asia-Pacific, and RoW)

Airborne Pods Market, By Sensor Type

EO/IR (Regional Analysis: North America, Europe, Asia-Pacific, and RoW)

EW/EA (Regional Analysis: North America, Europe, Asia-Pacific, and RoW)

IRCM (Regional Analysis: North America, Europe, Asia-Pacific, and RoW)

Others (Regional Analysis: North America, Europe, Asia-Pacific, and RoW)

Airborne Pods Market, By Range Type

Short (Regional Analysis: North America, Europe, Asia-Pacific, and RoW)

Intermediate (Regional Analysis: North America, Europe, Asia-Pacific, and RoW)

Long (Regional Analysis: North America, Europe, Asia-Pacific, and RoW)

Airborne Pods Market, By Region

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North America (Country Analysis: The USA, Rest of North America)

Europe (Country Analysis: Germany, France, the UK, Russia, and Rest of Europe)

Asia-Pacific (Country Analysis: China, Japan, India, and Rest of Asia-Pacific)

Rest of the World (Country Analysis: Latin America, the Middle East, and Others)

REPORT CUSTOMIZATION OPTIONS

With this detailed report, Stratview Research offers one of the following free customization options to our respectable clients:

COMPANY PROFILING

Detailed profiling of additional market players (up to 3 players)

SWOT analysis of key players (up to 3 players)

MARKET SEGMENTATION

Current market segmentation of any one of the pods by aircraft type

COMPETITIVE BENCHMARKING

Benchmarking of key players on the following parameters: Product portfolio, geographical reach, regional presence, and strategic alliances

Custom Research: Stratview Research offers custom research services across sectors. In case of any custom research requirement related to market assessment, competitive benchmarking, sourcing and procurement, target screening, and others, please send your inquiry at sales@stratviewresearch.com

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