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Air Traffic Management Market – Global Industry Size, Share, Trends, Opportunity, and Forecast, Segmented By Domain (Air Traffic Control, Air Traffic Flow Management, and Aeronautical Information Management), By Component (Hardware and Software), By Region & Competition, 2020-2030F

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Abstracts

Global Air Traffic Management Market was valued at USD 8.81 Billion in 2024 and is anticipated to grow USD 13.78 billion by 2030 with a CAGR of 7.82% during forecast period. The global Air Traffic Management (ATM) market is experiencing robust growth driven by several key factors. Technological advancements such as automation, satellite-based navigation systems, and digital communication infrastructure are revolutionizing the industry. These innovations enhance efficiency, safety, and capacity of air traffic management systems, catering to the increasing demand for reliable and swift air transport services worldwide. Moreover, the integration of artificial intelligence and machine learning algorithms into ATM systems is streamlining operations, optimizing route planning, and minimizing delays, thereby reducing operational costs for airlines and enhancing overall customer satisfaction. The U.S. and foreign air carriers transported 250.3 million passengers between the United States and international destinations for the year ending June 2024, marking a 14% increase compared to the same period the previous year. U.S. flag carriers maintained a steady market share of 52%, consistent with the prior 12-month period. Additionally, U.S. and foreign charter passengers represented 0.6% of total international air travel. This growth in passenger traffic underscores the expanding demand for air travel, further driving the need for enhanced Air Traffic Management (ATM) systems to ensure safe and efficient operations in an increasingly crowded airspace.

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The growing emphasis on environmental sustainability is shaping the ATM market landscape. The adoption of green technologies and practices, including fuel-efficient flight paths and eco-friendly aircraft designs, is becoming paramount. Regulatory bodies and industry stakeholders are collaborating to implement sustainable aviation initiatives, aiming to reduce carbon footprints and mitigate environmental impact. These initiatives not only align with global climate goals but also present lucrative opportunities for companies involved in developing and implementing eco-friendly ATM solutions.

Key Market Drivers

Increasing Air Travel Demand and Passenger Traffic

The relentless growth in air travel demand and passenger traffic is one of the most significant drivers of the Global Air Traffic Management Market. The aviation industry has been experiencing a continuous upward trajectory, driven by factors such as rising incomes, globalization, and the expansion of tourism. As more people opt for air travel, airports and air traffic management systems face the challenge of efficiently handling the increasing number of flights and passengers. The demand for air travel is particularly evident in emerging economies, where a burgeoning middle class has fueled a surge in passenger traffic. As a result, airports are consistently striving to enhance their capacity, accommodate larger volumes of aircraft, and manage the flow of passengers and cargo efficiently.

This driver has led to the need for advanced air traffic management systems that can optimize airspace utilization, reduce congestion, and enhance safety. The implementation of modern technologies, such as satellite-based navigation systems, automation, and data-sharing platforms, has become crucial to manage the growing number of aircraft in a safe and efficient manner. Moreover, the recent push for sustainable aviation and the adoption of greener technologies have created an opportunity for air traffic management to evolve and support the industry's environmental goals. By optimizing flight paths, reducing fuel consumption, and minimizing emissions, air traffic management contributes to a more sustainable aviation sector.

Advancements in Technology and NextGen ATM Systems

Advancements in technology and the transition to Next Generation (NextGen) air traffic management systems represent a fundamental driver of the Global Air Traffic

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Management Market. As technology evolves, the aviation industry is witnessing a significant shift in the way air traffic is managed, with the goal of enhancing safety, capacity, and efficiency. NextGen ATM systems leverage cutting-edge technologies, such as satellite-based navigation, data communications, and automation, to revolutionize the way aircraft navigate and communicate in the airspace. These systems aim to replace traditional radar-based methods with more accurate and reliable satellite navigation, enabling more direct flight paths, reduced congestion, and improved fuel efficiency.

Automation is a key aspect of NextGen systems, as it allows for more precise and efficient control of air traffic. Automated tools and procedures can reduce the risk of human error, streamline decision-making, and improve overall safety. Moreover, data-sharing platforms and collaborative decision-making enhance the coordination between air traffic control centers, airlines, and other stakeholders, optimizing the use of airspace. NextGen ATM systems are not only about technology but also about collaborative initiatives and standards that are adopted internationally. Harmonized procedures and equipment across regions can further improve global air traffic management.

The transition to NextGen ATM systems represents a significant investment in the modernization of air traffic management, aiming to meet the challenges posed by the increasing complexity of the aviation industry while providing more efficient and environmentally responsible solutions. For instance, in July 2023, the NextGen Next Generation Air Transportation System Florida Test Bed at Embry-Riddle Aeronautical University led a U.S. team in a groundbreaking international collaboration. This effort marked the first successful joint initiative to share and coordinate trajectory information, achieving optimal flight paths across multiple countries. Organized by the U.S. Federal Aviation Administration , the six-day live flight demonstration featured four distinct scenarios and flights connecting the United States with Japan, Singapore, and Thailand. The primary objective of the demonstration was to evaluate new aviation technologies aimed at improving communication, flight efficiency, and safety measures.

Safety and Security Imperatives

Safety and security imperatives are fundamental drivers of the Global Air Traffic Management Market. Safety remains a paramount concern in aviation, and the industry continually seeks to enhance the safety of air travel. This driver encompasses several aspects, air traffic management systems play a crucial role in ensuring safe separation between aircraft, preventing collisions, and minimizing the risk of accidents. Advanced

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technologies, such as collision avoidance systems, precise navigation, and improved communication protocols, are essential for achieving this goal.

Security concerns have become increasingly prominent in aviation, necessitating robust air traffic management systems to address threats such as unauthorized intrusions, terrorism, and cyberattacks. Air traffic control must not only safeguard the airspace but also protect critical communication and navigation infrastructure. As the demand for air travel continues to grow, efficient and safe management of air traffic becomes more challenging. Air traffic management systems help mitigate congestion and reduce the risk of overburdening airports and airspace, which could compromise safety. Furthermore, safety is intertwined with environmental concerns, as more efficient flight routes and operations can reduce the carbon footprint of aviation. The implementation of technologies that optimize fuel consumption and emissions is a safety imperative in the context of sustainability.

Safety and security are non-negotiable aspects of aviation, and the development of air traffic management systems continually seeks to address these concerns through technological advancements and procedural enhancements. For instance, in April 2024, both chambers of the US Congress reached an agreement on a $105 billion bill aimed at enhancing the safety of air travel. This legislative move follows several near-miss incidents between planes at US airports. The bill mandates an increase in the number of air traffic controllers and requires the Federal Aviation Administration (FAA) to implement new collision-prevention technologies for ground operations. Notably, the agreement also includes a provision prohibiting airlines from charging additional fees for families to sit together. However, consumer protections proposed by the Biden administration were excluded from the final version of the bill.

Growing Need for Capacity Expansion

The growing need for capacity expansion in the aviation industry is a compelling driver of the Global Air Traffic Management Market. Airports, especially those in major metropolitan areas, are operating at or near capacity, leading to congestion, delays, and reduced operational efficiency. To address these challenges, air traffic management systems must evolve to accommodate the increasing number of flights. This driver is particularly evident in regions experiencing rapid urbanization and economic growth, where airports face constraints in terms of runway capacity, terminal facilities, and airspace management. Moreover, seasonal variations and special events can exacerbate the capacity challenges faced by airports.

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To meet the need for capacity expansion, air traffic management systems are adopting various strategies. These include more efficient use of airspace, the implementation of performance-based navigation procedures, and the optimization of arrival and departure routes. Flexible and adaptable air traffic management systems can dynamically adjust to changing traffic patterns and reduce congestion. Moreover, the adoption of innovative technologies, such as advanced surveillance, automation, and predictive analytics, can further enhance the capacity of airports and airspace. Advanced tools for flow management, slot allocation, and collaborative decision-making between stakeholders are critical in this regard. The expansion of capacity is essential for maintaining the economic vitality of the aviation industry and meeting the expectations of passengers and shippers. It also contributes to the economic development of regions where airports serve as major transportation hubs.

Environmental Concerns and Sustainability Initiatives

Environmental concerns and sustainability initiatives are becoming increasingly influential drivers of the Global Air Traffic Management Market. As the aviation industry seeks to reduce its environmental footprint, air traffic management plays a vital role in achieving sustainability goals. One of the primary areas of focus is the optimization of flight routes to reduce fuel consumption and emissions. More direct flight paths, continuous descents, and fuel-efficient cruise altitudes are strategies employed by air traffic management systems to minimize the environmental impact of air travel.

The reduction of noise pollution around airports is a key consideration for air traffic management. Advanced arrival and departure procedures, such as optimized profile descents and quiet approaches, contribute to quieter and more environmentally friendly operations. Furthermore, the adoption of sustainable aviation fuels and the development of electric and hybrid-electric propulsion technologies are integral to reducing the carbon footprint of aviation. Air traffic management systems need to accommodate and support these emerging technologies by adjusting procedures and infrastructure.

Sustainability initiatives also encompass the reduction of emissions related to ground operations, such as taxiing and idling. Efficient ground operations supported by air traffic management contribute to the overall environmental responsibility of the aviation industry. Environmental concerns and sustainability initiatives are not only driven by regulatory requirements but also by the expectations of passengers and the growing awareness of the impact of aviation on the climate. Therefore, air traffic management systems are critical for achieving the industry's sustainability objectives while ensuring safe and efficient air travel.

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Key Market Challenges

Airspace Congestion and Capacity Constraints

Airspace congestion and capacity constraints pose significant challenges to the Global Air Traffic Management Market. As the demand for air travel continues to grow, many regions and airports are operating at or near their capacity limits. This congestion results in flight delays, increased fuel consumption, and economic losses for airlines and passengers.

Air traffic management systems must find innovative solutions to optimize airspace usage and reduce congestion. This requires the development of more efficient flight routes, airspace redesign, and enhanced coordination among air traffic control centers. Additionally, the capacity constraints faced by airports and runways must be addressed through infrastructure expansion and modernization.

The challenge is particularly pronounced in major metropolitan areas and during peak travel seasons. Moreover, the complexity of coordinating air traffic across national boundaries further complicates efforts to alleviate congestion. Mitigating these challenges requires collaborative international efforts, improved technology, and investment in infrastructure.

Technological Integration and Compatibility

Technological integration and compatibility represent a formidable challenge in the Global Air Traffic Management Market. The industry relies on a wide array of technologies, systems, and equipment to manage and track aircraft, ensuring safety and efficiency. The challenge lies in integrating and maintaining these systems to function seamlessly across different regions and airspaces. The aviation industry comprises a vast network of airports, air traffic control centers, and communication systems. These systems must be interoperable, with data shared in real time, to facilitate safe and efficient air travel. However, differences in technology and infrastructure among countries and regions can hinder this interoperability. To address this challenge, air traffic management systems require standardized protocols and communication procedures. Technological integration efforts should encompass the use of common data exchange formats and shared databases to ensure consistency in tracking and monitoring aircraft.

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The transition to Next Generation (NextGen) ATM systems, which leverage advanced technologies like satellite-based navigation, presents both opportunities and challenges. While these systems promise improved performance, their integration with legacy systems and training requirements for air traffic controllers can pose significant hurdles. Technological integration and compatibility are critical to air traffic management's ability to optimize operations and ensure safety. Addressing this challenge requires ongoing investments in technology and collaboration among stakeholders to harmonize systems and procedures.

Security and Cyber Threats

Security and cyber threats are a pervasive challenge for the Global Air Traffic Management Market. Ensuring the security of aviation infrastructure, data, and communication systems is of paramount importance to maintain the safety and integrity of air travel. The industry faces an array of security concerns, including unauthorized intrusions, terrorism, and cyberattacks.

Unauthorized intrusions, such as the incursion of unmanned aerial vehicles (UAVs) into restricted airspace, have become a growing concern. Air traffic management systems must have the capability to detect and respond to these intrusions swiftly to prevent airspace violations and potential collisions.

Terrorist threats also pose significant challenges. Airports and air traffic management centers must have robust security protocols and procedures to protect critical infrastructure and personnel from acts of terrorism. These threats necessitate vigilant security measures, as well as intelligence sharing and cooperation among aviation authorities and national security agencies.

In the realm of cyber threats, air traffic management systems are vulnerable to hacking, data breaches, and ransomware attacks. The integrity of communication systems, navigation data, and air traffic control information is crucial to aviation safety. The challenge is to implement robust cybersecurity measures to safeguard against potential cyberattacks that could disrupt air traffic operations.

Addressing security and cyber threats requires ongoing investments in cybersecurity infrastructure and protocols, as well as training for personnel to recognize and respond to potential threats. Collaboration with law enforcement agencies and international partners is essential to maintaining the safety and security of the aviation industry.

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Environmental and Sustainability Challenges

Environmental and sustainability challenges are pressing issues in the Global Air Traffic Management Market. The aviation industry faces growing scrutiny regarding its environmental impact, including greenhouse gas emissions, noise pollution, and local air quality. Regulatory requirements and public expectations have elevated the importance of addressing these challenges.

Reducing the carbon footprint of air travel is a central challenge. Air traffic management systems must prioritize the optimization of flight routes, fuel efficiency, and emissions reduction. Advanced technologies, such as satellite-based navigation and performance-based navigation procedures, play a key role in minimizing fuel consumption and emissions. Furthermore, the aviation industry must tackle the issue of noise pollution, particularly around airports. Quieter arrival and departure procedures, as well as noise abatement strategies, are vital for mitigating the impact of aircraft noise on local communities.

Sustainability challenges also encompass the adoption of alternative fuels, such as sustainable aviation fuels (SAFs), and the development of electric and hybrid-electric propulsion technologies. Air traffic management systems need to accommodate these emerging technologies and adjust procedures to support their use. The challenge of environmental and sustainability concerns requires the aviation industry to balance the growing demand for air travel with a commitment to reducing its environmental impact. Regulatory frameworks, along with technological and operational innovations, are central to addressing this challenge.

Workforce Training and Recruitment

Workforce training and recruitment represent a significant challenge in the Global Air Traffic Management Market. The industry relies on a skilled and knowledgeable workforce, including air traffic controllers, technicians, and other personnel, to ensure the safe and efficient operation of air traffic management systems. However, the sector faces challenges related to recruitment, training, and retaining experienced professionals.

One of the challenges is the retirement of a significant number of experienced air traffic controllers and technicians. The aging workforce, combined with the stringent training requirements for these positions, has created a need for recruiting and training new talent to fill the gap. Recruitment challenges include attracting a diverse and qualified

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pool of candidates to air traffic control careers. The profession demands strong analytical, communication, and decision-making skills, making it essential to promote careers in air traffic management and provide pathways for aspiring professionals.

Training and retaining personnel are crucial aspects of addressing this challenge. Air traffic management systems require comprehensive and ongoing training to ensure that controllers and technicians are equipped to handle the complexities of air traffic operations, including the transition to NextGen ATM systems and the adoption of new technologies.

Key Market Trends

Transition to Next-Generation (NextGen) ATM Systems

A fundamental trend in the Global Air Traffic Management Market is the transition to Next-Generation (NextGen) ATM systems. These advanced systems represent a major shift from traditional air traffic control methods, driven by the need for more efficient, safe, and sustainable air travel.

NextGen ATM systems leverage modern technologies, including satellite-based navigation, data communications, and automation, to enhance the way aircraft navigate and communicate in the airspace. These systems aim to replace traditional radar-based methods with more accurate and reliable satellite navigation, allowing for more direct flight paths, reduced congestion, and improved fuel efficiency.

Automation is a key aspect of NextGen systems. It includes advanced tools for airspace management, automated conflict resolution, and improved communication with air traffic controllers. Automation reduces the risk of human error, streamlines decision-making, and improves overall safety.

Collaborative decision-making (CDM) is another essential component of NextGen. It fosters better coordination among air traffic control centers, airlines, and other stakeholders, enabling the optimization of airspace and the efficient handling of air traffic. Through data sharing, CDM ensures that all parties are operating with the most up-to-date information.

NextGen systems also support performance-based navigation (PBN), which offers more precise and flexible routes, reducing the environmental impact of aviation. The transition to NextGen ATM systems is a global trend aimed at making air travel safer, more

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efficient, and environmentally responsible.

Adoption of Remote Air Traffic Control

The adoption of remote air traffic control (ATC) is an emerging trend in the Global Air Traffic Management Market. This innovative approach to air traffic management moves away from traditional brick-and-mortar control towers and introduces remote tower services (RTS) that can manage traffic at multiple airports from a centralized location.

Remote tower services leverage high-definition cameras, sensors, and data communication systems to provide a live feed of the airport's airspace to air traffic controllers located remotely. These controllers can monitor air traffic, provide instructions to pilots, and manage the flow of aircraft just as effectively as if they were physically present at the airport. This trend offers several advantages. First, remote tower services allow for more flexible staffing arrangements, as controllers can manage multiple airports without the need for extensive on-site personnel. This can lead to cost savings and improved operational efficiency.

Remote towers enhance safety and situational awareness. The use of advanced camera systems provides controllers with a 360-degree view of the airport, allowing them to detect potential hazards or security threats more effectively. Additionally, the redundancy of camera systems reduces the risk of blind spots caused by weather or equipment failures. The adoption of remote tower services is particularly beneficial for smaller and regional airports that may not have the resources to maintain traditional control towers. This trend is gaining momentum as it offers innovative solutions to the challenges of air traffic management in a rapidly changing aviation landscape.

Integration of Unmanned Aircraft Systems (UAS) into Airspace

The integration of Unmanned Aircraft Systems (UAS), commonly known as drones, into traditional airspace is a transformative trend in the Global Air Traffic Management Market. The proliferation of drones for various applications, from package delivery to aerial photography, has necessitated the development of systems to ensure their safe coexistence with manned aircraft.

To manage this integration, air traffic management systems are evolving to accommodate UAS operations. This includes the development of specialized UAS traffic management (UTM) systems to monitor and regulate drone movements in the airspace. UTM systems use advanced technologies, such as geofencing, real-time

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tracking, and automated conflict resolution, to ensure that drones operate within prescribed boundaries and avoid collisions with other aircraft. These systems are essential for preventing airspace congestion and ensuring the safety of both manned and unmanned operations.

The trend also involves regulatory changes to establish rules and standards for UAS operations. Aviation authorities worldwide are working to create a regulatory framework that allows for the safe and controlled use of drones in various industries. Additionally, the integration of UAS presents opportunities for air traffic management systems to incorporate advanced surveillance and tracking technologies to monitor and manage drone traffic effectively. This trend represents a dynamic shift in airspace management, as the industry adapts to the presence of unmanned aircraft in shared airspace.

Data-Driven Decision-Making

Data-driven decision-making is a pivotal trend in the Global Air Traffic Management Market. As technology advances, the volume of data generated by air traffic management systems, sensors, and aircraft is increasing exponentially. This trend leverages data analytics, artificial intelligence, and machine learning to extract valuable insights from this wealth of information. Data-driven decision-making encompasses various applications, such as predictive maintenance for aircraft, demand forecasting for airlines, and route optimization for air traffic controllers. By harnessing data analytics, the aviation industry can make more informed decisions and improve operational efficiency.

One of the primary applications of this trend is the development of predictive analytics for aircraft maintenance. By monitoring aircraft systems and analyzing data in real-time, airlines can predict when components may fail and perform maintenance proactively, reducing unscheduled downtime and improving safety. For air traffic controllers, data-driven decision-making allows for the optimization of flight routes and airspace management. Advanced algorithms can analyze historical data and real-time information to suggest more efficient flight paths, reduce congestion, and minimize fuel consumption. In addition, data-driven decision-making supports safety management systems (SMS) by identifying potential safety risks based on historical incident data. This allows for a proactive approach to safety, ensuring that lessons learned from past incidents are applied to prevent future occurrences.

Segmental Insights

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Component Insights

The air traffic control (ATC) market is segmented into hardware and software components, each playing a crucial role in ensuring the safe and efficient management of air traffic. The hardware segment includes all the physical systems and equipment necessary for air traffic control operations. This includes radar systems, communication devices, navigation systems, and surveillance equipment. These hardware components are essential for tracking and managing aircraft movements in real time, providing air traffic controllers with the tools they need to maintain safe distances between aircraft and guide them through various airspace sectors. The quality and reliability of these hardware systems are vital for preventing collisions, managing flight routes, and responding to emergencies. Investments in state-of-the-art hardware are crucial for modernizing air traffic control infrastructure to meet the increasing demands of air traffic management.

The software segment encompasses the digital systems and applications used to process and analyze data, support decision-making, and automate various tasks within air traffic control operations. Software solutions in this domain include flight planning systems, air traffic flow management software, radar processing software, and automation tools designed to reduce the workload of air traffic controllers. These software applications integrate real-time data from multiple sources to assist in managing air traffic efficiently, predicting congestion, and optimizing flight paths. They also play a critical role in communication between controllers and aircraft, ensuring that airspace management is seamless and responsive to changing conditions.

Both hardware and software components are interdependent in modern air traffic control systems. The continuous advancements in software development, particularly in automation and artificial intelligence, are transforming how controllers interact with the hardware infrastructure. Software advancements enable more accurate predictions of traffic patterns, better resource allocation, and improved safety measures. Meanwhile, hardware innovations, such as high-resolution radar systems and improved communication technologies, ensure that the software has reliable data inputs to process. As air traffic volumes continue to rise globally, the integration of both hardware and software components is essential for ensuring safe, efficient, and scalable air traffic management.

Regional Insights

North America stand out as the dominating market with its advanced ATM infrastructure

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and stringent safety regulations. The region's extensive airspace is managed by sophisticated ATC systems that utilize radar and satellite technologies for precise aircraft tracking and management. ATFM initiatives in North America focus on optimizing airspace capacity and managing high traffic volumes, particularly in major metropolitan areas and busy air corridors.

The regional segmentation of the global ATM market underscores diverse approaches to airspace management and operational efficiency. As air travel continues to expand globally, each region's efforts in enhancing ATM capabilities play a crucial role in ensuring safe and efficient air transportation, supporting economic growth, and meeting evolving passenger and cargo demands. Future advancements in technology and regulatory frameworks will further shape the evolution of ATM systems worldwide, driving innovation and sustainability in the aviation industry.

Key Market Players

Adacel Technologies Limited

Advanced Navigation and Positioning Corporation

Airbus SAS

Leidos Inc

Honeywell International Inc

L3Harris Technologies Inc

Indra Sistemas, S.A. (Indra)

RTX Corporation

Saab AB

Thales SA

Report Scope:

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In this report, the Global Air Traffic Management Market has been segmented into the following categories, in addition to the industry trends which have also been detailed below:

Air Traffic Management Market, By Domain:

Air Traffic Control

Air Traffic Flow Management

Aeronautical Information Management

Air Traffic Management Market, By Component:

Hardware

Software

Air Traffic Management Market, By Region:

Asia-Pacific

China

India

Japan

Indonesia

Thailand

South Korea

Australia

Europe & CIS

Germany

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Spain

France

Russia

Italy

United Kingdom

Belgium

North America

United States

Canada

Mexico

South America

Brazil

Argentina

Colombia

Middle East & Africa

South Africa

Turkey

Saudi Arabia

UAE

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Competitive Landscape

Company Profiles: Detailed analysis of the major companies present in the Global Air Traffic Management Market.

Available Customizations:

Global Air Traffic Management Market report with the given market data, TechSci Research offers customizations according to a company's specific needs. The following customization options are available for the report:

Company Information

Detailed analysis and profiling of additional market players (up to five).

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