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Europe & CIS Airborne Telemetry Market By Technology (Wired, Wireless), By Application (Commercial, Defense), By Component (Receiver, Transmitter, Antenna), By Country, Competition, Forecast & Opportunities, 2020-2030F

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Abstracts

Europe & CIS Airborne Telemetry Market was valued at USD 460.72 Million in 2024 and is expected to reach USD 606.20 Million by 2030 with a CAGR of 4.68% during the forecast period. Europe & CIS Airborne Telemetry market is witnessing significant growth due to rising defense modernization programs, increasing deployment of advanced aircraft platforms, and the growing need for real-time mission-critical data transmission. Adoption of unmanned aerial systems and next-generation airborne sensors is enhancing telemetry capabilities, enabling more accurate monitoring, testing, and evaluation of defense systems. Technological trends such as miniaturization of telemetry components, integration with AI-driven analytics, and secure high-speed communication links are shaping market dynamics, offering more efficient and reliable data acquisition during flight operations. Opportunities lie in expanding unmanned system networks, upgrading legacy telemetry systems, and developing interoperable solutions that can support multiple platforms across various missions.

Market Drivers

Rising Defense Modernization Programs

Defense modernization programs are accelerating the demand for advanced airborne telemetry systems. Militaries are focusing on upgrading their existing fleets with more sophisticated aircraft, including fighter jets, transport planes, and reconnaissance platforms, which require enhanced telemetry capabilities to monitor performance, test

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systems, and gather real-time mission data. Advanced telemetry systems enable comprehensive tracking of aircraft parameters such as speed, altitude, engine performance, and weapon system operation during flight tests and operational missions. The integration of telemetry with modern command and control networks allows decision-makers to analyze data in real time, ensuring greater operational efficiency and readiness. Increased budget allocations toward modernization programs and technology upgrades are encouraging defense agencies to adopt more robust telemetry solutions. For instance, in 2024, EU states spent $370B on defence, up 19% from 2023 and projected at $412B in 2025. Investments reached $115B, with $95B for equipment, expected to top $108B in 2025. R&D rose to $14B and should hit $18B in 2025. The defence industry generated $172B turnover, $62B exports, and 627K jobs in 2023. EU programmes added $9.5B via the Defence Fund, $1.8B for mobility, $300M for joint procurement, $500M for ammunition, and a planned $1.6B under EDIP by 2027, with 2,500 SMEs central to supply chains.

Key Market Challenges

High Development and Operational Costs

The development, integration, and operation of advanced airborne telemetry systems involve substantial financial investment. Telemetry components, including sensors, communication modules, and ground control infrastructure, require precision engineering, rigorous testing, and adherence to stringent defense standards. High costs associated with research and development, system calibration, and maintenance limit the ability of some operators to adopt cutting-edge solutions. Additionally, long lifecycle requirements for aircraft telemetry systems necessitate ongoing support, software updates, and component replacement, which further increase operational expenses. Budget constraints within defense organizations may result in prioritization of essential systems, delaying telemetry upgrades. Complex integration requirements with existing aircraft platforms and defense networks demand specialized expertise and resources, adding to the cost burden.

Key Market Trends

Miniaturization of Telemetry Components

Miniaturization of telemetry hardware is transforming the airborne telemetry landscape by enabling lighter, more compact, and energy-efficient systems. Smaller sensors, transmitters, and data processing units reduce aircraft payload weight, enhance fuel

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efficiency, and allow integration into platforms with limited space. Miniaturized components can be installed on unmanned aerial systems, small aircraft, and even high-performance fighter jets without impacting aerodynamics or operational capabilities. Technological advancements in microelectronics, MEMS sensors, and integrated circuits are driving this trend, offering higher accuracy and reliability within a smaller footprint. Lightweight telemetry solutions also reduce power consumption, extend operational endurance, and simplify installation and maintenance. The trend supports modular designs that can be easily upgraded or replaced without extensive retrofitting.

Key Market Players

BAE Systems PLC

Lockheed Martin Corporation

L3Harris Technologies Inc.

Safran SA

Cobham PLC

Honeywell International Inc.

Thales Group

Kongsberg Gruppen AS

Orbit Communications Systems Ltd

AstroNova Inc.

Report Scope:

In this report, Europe & CIS Airborne Telemetry Market has been segmented into the following categories, in addition to the industry trends which have also been detailed below:

Europe & CIS Airborne Telemetry Market, By Technology:

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Wired

Wireless

Europe & CIS Airborne Telemetry Market, By Application:

Commercial

Defense

Europe & CIS Airborne Telemetry Market, By Component:

Receiver

Transmitter

Antenna

Europe & CIS Airborne Telemetry Market, By Country:

Germany

Russia

France

Spain

Italy

United Kingdom

Poland

Rest of Europe & CIS

Competitive Landscape

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Company Profiles: Detailed analysis of the major companies presents in Europe & CIS Airborne Telemetry Market.

Available Customizations:

Europe & CIS Airborne Telemetry Market report with the given market data, TechSci Research offers customizations according to the 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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