

Military Non-Steerable Antenna Market – Global Industry Size, Share, Trends, Opportunity, and Forecast, Segmented By Platform (Ground, Airborne, Marine), By Product (Blade, Patch, Whip, Conformal, Rubber Ducky, Loop, Others), By Application (Communication, SATCOM, Navigation, Electronic Warfare), By Region, By Competition, 2020-2030F

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Abstracts

The Global Military Non-Steerable Antenna Market was valued at USD 582.57 Million in 2024 and is expected to reach USD 873.42 Million by 2030 with a CAGR of 7.04% during the forecast period. The Military Non-Steerable Antenna Market is experiencing substantial growth driven by the growing defense budgets of several nations and the increasing need for efficient communication systems in military operations. The integration of advanced technologies in military communications is essential for enabling real-time data transmission and improving operational effectiveness. India's total defense expenditure for the fiscal year 2023-2024 is USD 72.6 billion, with USD 22.26 billion allocated for the acquisition of new weapons and military platforms. The Indian Air Force is set to receive USD 7.43 billion for new weapons, the Navy will receive USD 6.36 billion, and the Army will be allocated USD 4.28 billion.

Market Drivers

Rising Defense Budgets and Military Modernization

The continuous increase in defense spending across various nations is a major driver for the growth of the military non-steerable antenna market. Governments around the world are prioritizing military modernization to maintain strategic defense capabilities,

which often includes upgrading communication and surveillance systems. Non-steerable antennas are a key component of military communication systems due to their durability, reliability, and performance in providing stable signal transmission. With nations investing more in advanced technologies to improve situational awareness, defense operations, and secure communications, demand for these antennas is on the rise. Furthermore, non-steerable antennas are crucial for communication in remote, challenging environments, which are commonly encountered in military operations, leading to an increased reliance on them.

Advancements in Communication Technologies

The constant advancement of communication technologies is another significant factor driving the growth of the military non-steerable antenna market. Military forces worldwide are increasingly dependent on sophisticated communication systems to ensure real-time data transmission and operational coordination. Non-steerable antennas are critical in supporting wide-band communication systems and providing stable connectivity over vast areas, especially for military personnel deployed in mobile or remote environments. Technological innovations have led to non-steerable antennas being more compact, efficient, and capable of handling higher frequencies, thereby expanding their applications in both tactical and strategic military operations. These technological upgrades are enabling more effective use of satellites, UAVs, and other communication platforms, driving their demand.

Increased Focus on Network-Centric Warfare

As modern warfare shifts toward network-centric operations, there is a growing emphasis on effective communication and information exchange. Network-centric warfare relies on real-time data sharing among military units, which enhances decision-making and operational efficiency. Non-steerable antennas play a pivotal role in this environment by ensuring robust, uninterrupted communication channels. Their ability to provide reliable connectivity without the need for continuous adjustment or orientation makes them an ideal solution for mobile military platforms, such as vehicles, ships, and aircraft. The increasing adoption of network-centric strategies is, therefore, boosting the need for non-steerable antennas to support seamless communication across military units and assets.

Modernization of Legacy Radio Systems

Modernizing legacy radio systems is a key focus for defense forces globally, as many

military organizations continue to rely on outdated systems that may struggle to meet the demands of contemporary warfare. These older systems are also more susceptible to interference or interception by adversaries. One of the primary drivers behind this modernization is the need for interoperability between military forces and allied nations. Modern radio systems incorporate advanced technologies like digital signal processing, which enhances secure communication, encryption, and other essential features required for military operations. As radio systems are being upgraded, the antennas used in these systems will also be replaced, driving the demand for non-steerable antennas. For example, in March 2022, the US Army awarded Thales Defense and Security Inc. (US) and L3Harris Technologies, Inc. (US) the opportunity to compete for a USD 6.1 billion contract to modernize the Single Channel Ground and Airborne Radio Systems (SINCGARS). In November 2022, the British Army selected L3Harris Technologies, Inc.'s communication systems division to supply 1,300 new ground-based radios under a contract valued at around USD 109 million. The Multi-mode Receiver (MMR) devices are designed to support both military ground-to-ground and ground-to-air communications across various security classification levels, and to ensure interoperability with systems used by the US and NATO allies.

Key Market Challenges

Technological Complexity and Integration

One of the significant challenges in the global military non-steerable antenna market is the technological complexity involved in their integration with existing systems. Military operations require highly reliable and advanced communication systems that must work seamlessly with a wide range of other technologies. Non-steerable antennas need to be integrated with various communication platforms, including satellites, ground systems, and mobile units, without causing disruptions. This complexity often demands custom solutions that can increase costs and prolong development timelines. Furthermore, these antennas must be compatible with the latest defense technologies, which may involve frequent updates and adjustments, posing a challenge to manufacturers.

Vulnerability to Electronic Warfare and Interference

As modern warfare increasingly incorporates electronic warfare (EW) tactics, military communication systems, including non-steerable antennas, face the risk of interference or jamming. Adversaries may use sophisticated methods to disrupt signal transmission, rendering communication systems ineffective. Although non-steerable antennas offer reliability in stable environments, their performance can be hindered in high-interference

conditions. Developing antennas that are resistant to jamming, secure against interception, and resilient in challenging environments remains a crucial challenge for manufacturers.

Cost Constraints and Budget Limitations

While defense budgets are increasing globally, financial constraints and cost considerations still impact the military acquisition of advanced technologies like non-steerable antennas. Developing high-performance antennas that meet military specifications can be expensive, particularly with the need for advanced materials and technology integration. Additionally, maintaining cost efficiency while ensuring high levels of security, durability, and performance remains a challenge, especially for countries with limited defense budgets. Balancing these factors while ensuring the antennas meet operational needs is an ongoing challenge for both manufacturers and defense organizations.

Key Market Trends

Increased Adoption of Advanced Materials

A significant trend in the global military non-steerable antenna market is the growing use of advanced materials to enhance performance, durability, and functionality. Materials like composite polymers, carbon fiber, and other lightweight, high-strength substances are increasingly being incorporated into antenna designs. These materials provide better resistance to harsh environmental conditions, such as extreme temperatures, humidity, and vibration, making antennas more reliable in the field. Additionally, advanced materials help reduce the overall weight of the antennas, which is crucial for mobile platforms like aircraft, vehicles, and naval vessels. This trend is driven by the need for antennas that can perform reliably in complex and often unpredictable military environments.

Integration with Next-Generation Communication Systems

Another trend is the growing integration of non-steerable antennas with next-generation communication technologies, such as 5G, satellite communication, and high-bandwidth systems. As military operations become more data-intensive, there is an increasing demand for faster, more reliable communication networks. Non-steerable antennas are evolving to support these technologies by offering wider bandwidths, better signal processing, and enhanced data transmission capabilities. This trend is driven by the

need for seamless, real-time communication across various platforms, from ground units to airborne assets, improving operational efficiency and situational awareness.

Focus on Miniaturization and Compact Designs

There is a noticeable shift toward the miniaturization and compact design of non-steerable antennas. As military platforms become more mobile and space-constrained, there is an increasing demand for smaller, lightweight antennas that still deliver high performance. This trend is particularly important for unmanned aerial vehicles (UAVs), portable ground systems, and other mobile military units that require antennas that do not compromise on functionality while being compact and easy to deploy. The push for miniaturization is aligned with the military's broader goals of enhancing mobility and operational flexibility without sacrificing communication capabilities.

Segmental Insights

Application Insights

The communication segment was the dominant application in the global military non-steerable antenna market, primarily due to the critical role antennas play in ensuring effective communication during military operations. Non-steerable antennas are widely used for secure, reliable communication across various military platforms, including ground vehicles, aircraft, naval vessels, and satellite communication systems. They are essential for maintaining real-time communication and situational awareness, which are crucial for decision-making and coordinating operations in diverse and often hostile environments. Non-steerable antennas offer several advantages in communication systems, including their simplicity, reliability, and low maintenance requirements. These antennas are particularly well-suited for military applications where communication needs to remain stable and uninterrupted, regardless of the movement of platforms or the direction of the signal. Their ability to provide consistent connectivity without requiring constant adjustment or steering makes them an ideal choice for tactical communications, emergency response, and mission-critical operations. As military forces increasingly rely on advanced communication systems to support network-centric warfare, the demand for non-steerable antennas in communication applications is expected to grow. The need for robust, secure, and high-performance communication technologies continues to rise, further solidifying the position of communication as the leading application segment in the military non-steerable antenna market.

Regional Insights

Asia Pacific holds the largest market share in the global military non-steerable antenna market due to the region's significant defense investments and increasing modernization of military technologies. Countries such as China, India, Japan, and South Korea are expanding their defense budgets to enhance their military capabilities and secure their borders. This includes upgrading communication systems, where non-steerable antennas play a crucial role in ensuring reliable and secure communication in dynamic and often remote environments. The region's growing focus on network-centric warfare, along with the need for enhanced communication technologies, has fueled the demand for non-steerable antennas. Additionally, the presence of major defense manufacturers in Asia Pacific, along with collaborations and partnerships with Western defense companies, has contributed to the market's growth. As countries in the region continue to invest in advanced defense infrastructure and improve their communication systems, the demand for non-steerable antennas is expected to remain strong, further strengthening Asia Pacific's dominant market position.

Key Market Players

Antcom Corporation

Cobham Advanced Electronic Solutions

Comrod Communication AS

Eylex Pty Ltd.

Hascall-Denke

L3Harris Technologies Ltd.

Lockheed Martin Corporation

MTI Wireless Edge Ltd.

Raytheon Technologies Corporation

Rohde & Schwarz GmbH & Co KG

Report Scope:

In this report, the global Military Non-Steerable Antenna Market has been segmented into the following categories, in addition to the industry trends which have also been detailed below:

Military Non-Steerable Antenna Market, By Platform:

Ground

Airborne

Marine

Military Non-Steerable Antenna Market, By Product:

Blade

Patch

Whip

Conformal

Rubber Ducky

Loop

Others

Military Non-Steerable Antenna Market, By Application:

Communication

SATCOM

Navigation

Electronic Warfare

Military Non-Steerable Antenna Market, By Region:

North America

United States

Canada

Mexico

Europe & CIS

France

Germany

Spain

Italy

United Kingdom

Asia-Pacific

China

Japan

India

Vietnam

South Korea

Australia

Thailand

Middle East & Africa

South Africa

Saudi Arabia

UAE

Turkey

South America

Brazil

Argentina

Competitive Landscape

Company Profiles: Detailed analysis of the major companies presents in the global Military Non-Steerable Antenna Market.

Available Customizations:

Global Military Non-Steerable Antenna Market report with the given market data, Tech Sci 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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