

Tactical Communication Market Size and Forecast (2021 - 2031), Global and Regional Share, Trend, and Growth Opportunity Analysis Report Coverage: By Platform (Airborne, Shipborne, Land, and Underwater), Type (Soldier Radio, Manpack Radio, VIC (Vehicular Intercommunication Radio), High Capacity Data Radio (HCDR), and Others), Technology (Time-Division Multiplexing (TDM) and Next-Generation Network (NGN)), Application (ISR, Combat and Command and Control), and Geography (North America, Europe, Asia Pacific, Middle East and Africa, South and Central America)

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Abstracts

The global tactical communication market size was valued at US\$22.03 billion in 2024 and is expected to reach US\$44.83 billion by 2031; it is estimated to record a CAGR of 11.00% from 2025 to 2031.

Rising Adoption of Satellite Communication (SATCOM) Technology to Provide Advanced Communication Solution

As the battlefield in the 21st century is becoming ever more network-centric, satellite communication technology is moving to its next generation, and demand for it is increasing. In the current environment, a connected soldier should have network capabilities that allow real-time information sharing to accomplish mission requirements

and preserve operational capability. Due to the large area of responsibility (AOR), naval battlefields may become a difficult task.

Network-centric warfare, which permits communication across all sensors, weapons, and platforms spread across the battle space, has been highlighted by naval forces worldwide. SATCOM is a vital component in creating and realizing network-centric capabilities for military forces. Geographical obstacles have compounded the situation for terrestrial networks, which are often considered unsafe.

On air-to-ground, air-to-air, ship-to-ship, and ship-to-shore platforms, SATCOM technology design elements provide communication channels. The communication satellite terminals make it easier to integrate tactical communication networks on mobile platforms, warships, and aircraft. For instance, in July 2025, the U.S. Space Force's Space Systems Command (SSC) revealed a new acquisition strategy aimed at accelerating the delivery of advanced anti-jam wideband satellite communications to warfighters worldwide. Known as the Protected Tactical SATCOM (PTS) Family of Systems (FoS), this initiative is designed to enhance near-term capabilities through the Protected Tactical Waveform (PTW), boosting operational effectiveness by building on the progress achieved with current PTS prototypes. As a result, the tactical communication market increases the demand for combat situational awareness equipment with portable satellite terminals.

The global tactical communication market is poised for significant growth driven by rising defense modernization and expenditures, increasing asymmetric and hybrid warfare, focus on joint military operations, advancements in technologies like 5G, AI, satellite communication, and software-defined radios, along with growing demand for secure, resilient, and real-time communication systems in military and homeland security applications.

Regionally, the Asia-Pacific (APAC) region is expected to witness the highest growth rate, driven by geopolitical tensions and modernization initiatives. North America remains a significant market supported by heavy defense spending and technological leadership. Europe, the Middle East, and Africa also contribute to the market with their own modernization and security needs.

In the current scenario, military expenditure within the Asia Pacific region is witnessing growth due to the government initiatives to establish a strong military base across these countries. China and India are increasing their military spending, resulting in the rise in manufacturing and procurement of new aircraft, fighter jets, radar systems,

communication systems, electronic warfare, and flight management systems, among others.

The complexity of joint operations and multinational exercises drives the demand for interoperable communication systems that comply with international standards. Tactical communication is a support function and a strategic enabler of real-time decision-making, situational awareness, and mission success. As a result, procurement strategies in the region have shifted from legacy systems to more agile, software-driven architectures that allow for rapid updates and adaptation to electronic warfare threats.

A key trend is the emphasis on self-reliance and domestic capability building. Countries in the region are investing in indigenous defense technology ecosystems, forming partnerships between governments and private industry to reduce dependency on foreign systems. The emergence of cybersecurity threats has elevated the importance of secure communication systems, focusing on robust data protection, anti-jamming capabilities, and network survivability. While the level of maturity varies between countries, the overall trajectory of the APAC tactical communication market is toward increasingly advanced, integrated, and sovereign solutions.

BAE Systems plc, General Dynamics Corp, Iridium Communications Inc., Northrop Grumman Corp, RTX Corporation, Thales SA, Ultra Electronics Holdings Ltd, Viasat Inc, Airbus SE and L3 Harris Technologies Inc are among the key global tactical communication market players that are profiled in this market study.

The overall global tactical communication market size has been derived using both primary and secondary sources. Exhaustive secondary research has been conducted using internal and external sources to obtain qualitative and quantitative information related to the global tactical communication market size. The process also helps obtain an overview and forecast of the market with respect to all the market segments. Also, multiple primary interviews have been conducted with industry participants to validate the data and gain analytical insights. This process includes industry experts such as VPs, business development managers, market intelligence managers, and national sales managers, along with external consultants such as valuation experts, research analysts, and key opinion leaders, specializing in the global tactical communication market.

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