

Military Communications Market Size & Share Analysis - Growth Trends and Forecast (2026 - 2031)

> **Industry:** Military Aircraft & Defense Electronics (Aerospace & Defense)
> **Source:** https://www.mordorintelligence.com/industry-reports/military-communications-market
> **Scraped Date:** 2026-09-17

Executive Market Summary

Market Metric	Details
Base Market Size	USD 37.70 billion
Projected Forecast (2031)	USD 37.70 billion
Growth Rate (CAGR)	5.85 %
Largest Market Region	N/A
Fastest-Growing Region	N/A

Market Visualizations & Infographics

[Major players in Military Communications industry](images/chart_2.png)

[Military Communications Market Size](images/chart_3.png)

[Military Communications Market Share by Communication Type, 2025](images/chart_4.png)

[Military Communications Market Share by Application, 2025](images/chart_5.png)

[Military Communications Market Growth Rate by Region](images/chart_6.png)

[Military Communications Market Concentration](images/chart_7.png)

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Comprehensive Research Analysis

Overview Points List Flex 49 Share Feature End

Market OverviewStudy Period | 2020 - 2031 |
Market Size (2026) | USD 37.70 Billion |
Market Size (2031) | USD 50.09 Billion |
Growth Rate (2026 - 2031) | 5.85 % |
Fastest Growing Market | Asia Pacific |
Largest Market | North America |
Market Concentration | Medium |
Major Players*Disclaimer: Major Players sorted in no particular order

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Market Overview

Military Communications Market Analysis by Mordor Intelligence Military communications market size in 2026 is estimated at USD 37.7 billion, growing from 2025 value of USD 35.62 billion with 2031 projections showing USD 50.09 billion, growing at 5.85% CAGR over 2026-2031. Rising geopolitical friction, Indo-Pacific and Arctic deployments, and the shift toward multi-domain operations are fueling the steady expansion of the military communications market. Land, sea, air, space, and cyber operators now require interoperable systems that offer jam-resilient, beyond-line-of-sight (BLOS) connectivity across contested spectrum. Demand concentrates on software-defined radios, open-architecture terminals, and private 5G nodes that minimize weight while maximizing waveform agility. Government investment in proliferated low-earth-orbit constellations and AI-enabled spectrum management further widens vendor opportunities. Competitive intensity grows as commercial 5G suppliers and cloud providers enter the military communications market with agile development cycles and lower costs than traditional hardware-centric incumbents.

Key Report Takeaways* Ground-based systems commanded 35.78% of the military communications market share in 2025, while underwater communications are projected to grow at a 9.12% CAGR between 2026 and 2031.

* Military radio systems accounted for a 30.22% share of the military communications market size in 2025, while cybersecurity subsystems are projected to post the fastest growth at an 8.02% CAGR through 2031.

* By application, command and control (C2/C3) applications led with 39.05% revenue share in 2025; while electronic warfare (EW) support applications are forecasted to grow at a 7.11% CAGR through 2031.

* By platform, land forces dominated 41.12% of the military communications market share; space forces platforms are expected to advance at an 10.98% CAGR by 2031.

* North America held 41.11% of the military communications market in 2025, while Asia-Pacific records the highest regional CAGR at 6.45% through 2031.

Key Market Trends

Market Trends and Insights
Drivers Impact Analysis of Military Communications Market*
Driver | (%) Impact on CAGR Forecast | Geographic Relevance | Impact Timeline |

DoD “Joint All-Domain Command and Control” roll-outs | + 1.20% | North America, NATO allies | Medium term (2-4 years) |

Proliferation of low-earth-orbit (LEO) defense constellations | + 0.80% | Global | Long term (≥4 years) |

Demand spike for jam-resilient SATCOM on the Move (SOTM) | + 1.10% | Global | Short term (≤2 years) |

AI-enabled radio resource management in contested spectrum | + 0.90% | North America, EU, APAC | Medium term (2-4 years) |

Private 5G/6G tactical mesh networks for brigade-level autonomy | + 1.30% | Global | Medium term (2-4 years) |

Increased Arctic and Indo-Pacific deployments requiring beyond-line-of-sight (BLOS) links | + 0.70% | Arctic nations, Indo-Pacific allies | Long term (≥4 years) |

Source: Mordor Intelligence |

Competitive Landscape

Competitive Landscape

Eighteen heritage primes capture roughly 60% of revenue, underscoring moderate c

concentration in the military communications market. Long lead certification, crypto clearance, and in-house manufacturing have historically shielded incumbents; commercial 5G entrants and agile software firms are eroding barriers. Lockheed Martin's 5G.MIL program with Nokia and Verizon has proven that commercial cellular stacks can quickly integrate security wrappers for classified use. L3Harris, meanwhile, pairs radio hardware with AI orchestration software, widening its portfolio. Thales partners with France's CEA to embed trusted generative AI in future radios, aiming for intelligent waveform adaptation.[4]Thales, "Thales and CEA Partner on Trusted Generative AI for Defence," [thalesgroup.com](https://www.thalesgroup.com)

Emerging suppliers focus on niche gaps. Ukrainian developers such as Himera have fielded quantum-safe encryption radios that attracted a USD 921 million US Army procurement in 2025; these units demonstrated resilience under real combat conditions. Nordic vendor Ovzon invests in 6G satellite backbones to bridge Arctic dead zones. KATIM, an EDGE Group subsidiary, collaborates with Nokia to offer locally encrypted 5G networks to Gulf states.[5]KATIM, "EDGE Group and Nokia Collaborate to Strengthen Secure Communications," katim.com Such specialized solutions pressure incumbents to refresh product lines more often, catalyzing a shift toward modular, platform-agnostic road maps across the military communications market.

Looking ahead, acquisition strategies center on AI, mesh orchestration, and LEO-to-GEO link managers. Suppliers that master open-standards compliance without sacrificing hardened security position themselves to outpace rivals as procurement agencies mandate vendor interoperability.

Military Communications Industry Leaders* BAE Systems plc

- * RTX Corporation
- * General Dynamics Corporation
- * Thales Group
- * L3Harris Technologies, Inc.

* *Disclaimer: Major Players sorted in no particular order
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Component Component 3 Scope Of The Report Bottom

Global Military Communications Market Report ScopeMilitary communication is the transmission of information from reconnaissance and other units in contact with the enemy and the means for exercising command by the transmission of orders and instructions of commanders to their subordinates.

The military communications market is segmented by communication type, component, application, and geography (North America, Europe, Asia-Pacific, Latin America, and the Middle East and Africa). By communication type, the market is segmented into shipborne, ground-based, underwater, air-ground, and airborne communication. By component, the market is segmented into military satcom systems, military radio systems, and military security systems. By application, the market is segmented as command and control, routine operations, situational awareness, and other applications. The report also covers the market sizes and forecasts for the military communications market in major countries across different regions.

For each segment, the market size is provided in terms of value (USD).

By Communication TypeShipborne |
Ground-based |
Underwater |
Air to Ground |

Airborne |

Segmentation Accordion Item

By GeographyNorth America | United States |
| Canada |
| Mexico |
Europe | United Kingdom |
| France |
| Germany |
| Russia |
| Rest of Europe |
Asia-Pacific | China |
| India |
| Japan |
| South Korea |
| Australia |
| Rest of Asia-Pacific |
South America | Brazil |
| Rest of South America |
| |
Middle East and Africa | Middle East | Saudi Arabia |
	Israel
	United Arab Emirates
	Rest of Middle East
Africa	Egypt
	South Africa
	Rest of Africa

Frequently Asked Questions

What is the projected value of the military communications market in 2031?

The military communications market is forecasted to reach USD 50.09 billion by 2031 with a CAGR of 5.85%.

Which region shows the fastest growth through 2031?

Asia-Pacific posts the highest CAGR at 6.45% because of territorial disputes and modernization drives.

Which communication type segment grows fastest?

Underwater communications expand at a 9.12% CAGR as navies prioritize covert maritime connectivity.

How large is the command and control application segment?

The command and control application held 39.05% of 2025 revenue, making it the largest single application category.

What technology trend most influences new procurements?

Adoption of software-defined, multi-band radios integrated with private 5G and AI-based spectrum management is reshaping acquisition priorities.

Who are two leading companies driving satellite-based resilience?

L3Harris and Lockheed Martin lead through proliferated LEO deployments and hybrid 5G MIL architectures.