
Market Scenario

Military aircraft pilots require a clear presentation of cockpit data in order to boost their decision-making capabilities. Thus, digital glass cockpit systems have become an effective means for defense authorities to enhance their capabilities. Current analog cockpit systems do not support these demands, resulting in an increase in cockpit workload and a decrease in the troop's situational awareness.

The digital glass cockpit system reduces the aircraft weight and information-management workload, enables power saving, allow easier interaction with the air traffic control (ATC) to avoids accidents, and results in faster training for new pilots. Also, it improves functionality and accuracy with enhanced safety and situational awareness for both the pilot and aircraft. In addition, the concept of advanced touchscreen display technologies is gaining popularity in the military aircraft market, currently.

The digital glass cockpit display systems include multi-function displays (MFDs), primary flight displays (PFDs), and engine indications and crew alerting system (EICAS) that enable replacement of clusters of mechanical flight instrument gauges with the graphical representations of information from onboard/external sensors and navigation systems.

Modern digital glass cockpit systems use liquid crystal display (LCD) screens to display critical flight information, replacing the older, obsolete, and bulkier cathode ray tube (CRT) monitors. Moreover, some glass cockpit integrates an HDTs (helmet display and tracking system), in-built user-interface, and multi-functional smart displays to deliver a fully compatible multi-mission cockpit. Furthermore, the glass cockpit enables the troop to execute a wide variety of missions including utility, naval, and attack missions, while receiving relevant aircraft and mission data and reducing life cycle costs.

In addition, the glass cockpits have been certified by FAA at low cost, and the organization encourages the development and installation of the glass cockpits in aircraft, to enhance safety. As a result, the vendors invest in creating digital glass cockpits that are installed in a variety of aircraft without unnecessary certifications bearing high costs.

The Global Military Aircraft Digital Glass Cockpit Systems Market is estimated to grow at a CAGR 3.8% during the forecast period of 2019-2025.

Segmentation of the Global Military Aircraft Digital Glass Cockpit Systems Market
The military aircraft digital glass cockpit systems market is segmented on system, aircraft type, and region. Based on the system, the market has been segmented into multi-functional display systems, primary flight display, engine-indicating and crew-alerting system (EICAS) display, and others. The multi-functional display systems segment is expected to witness the highest CAGR during the forecast period. The high use of multi-functional display systems in the special mission aircraft and fighter jets is driving the growth of this segment.

On the basis of aircraft type, the market has been segmented into fighter jet, transport aircraft, helicopter, and special mission aircraft. The helicopter segment is expected to grow at the highest CAGR during the forecast period. This is due to the increase in deployment of glass cockpit systems in military mission helicopters.

Based on the region, the market has been segmented into North America, Europe, Asia-Pacific, Middle East & Africa, and Latin America. Europe is one of the major markets for military aircraft digital glass cockpit systems. Countries such as Russia, France, Germany, Poland, Portugal, Spain, and the UK are a few of the major countries with a large fleet of military aircraft in operation. Moreover, the European Union (EU) member countries and Russia have allocated billions of dollars for major military modernization programs. As a result, the military aircraft fleet has also been upgraded with modern and digital glass cockpit systems.

Similarly, in Asia-Pacific, the emerging nations such as China and India are driving the market with their increasing defense budgets to strengthen national security. China, in particular, has the largest military expenditures in the region, followed by India. China has undergone significant military modernization and restructuring to deal with potential threats and enhance its defense capabilities. The country’s military spending increased by 175% between 2003 and 2012, the largest increase for the period among the top 15 countries, worldwide.

Key Players

The key players in the Global Military Aircraft Digital Glass Cockpit Systems Market are Astronautics Corporation of America (US), Barco NV (Belgium), Collins Aerospace (US), Elbit Systems Ltd (Israel), Esterline Technologies Corporation (US), Garmin Ltd (Switzerland), Honeywell International Inc. (US), L3Harris Technologies, Inc. (US), Leonardo S.p.A. (Italy), and Thales Group (France).

Research Methodology

The market values and forecast are derived using the Market Research Future (MRFR) research methodology, which includes secondary research, primary interviews, data triangulation, and validation from an in-house data repository and statistical modeling tools.

- **Secondary Research**

  In this process, data is collected from various secondary sources, including annual reports, SEC filings, journals, government associations, aerospace & defense magazines, white papers, corporate presentations, company websites, and paid databases.

- **Primary Research**

  In this process, both the demand- and supply-side parties are interviewed to extract facts and insights into the market forecast, production, trends, and projected market growth. Industry stakeholders such as CEOs, VPs, directors, and marketing executives across the value chain are
approached to obtain key information.

**Key Insights**

- Market Sizing, Forecast, and Analysis: Detailed coverage of the market segment and sub-segments
- Regional/Country Trends and Forecast: Detailed analysis of the market in North America, Europe, Asia-Pacific, Middle East & Africa, and Latin America, along with key countries in each region
- Market Dynamics Intelligence: Market drivers, opportunities, trends, restraints, Porter’s five forces, supply chain, and value chain analysis
- Technology Trends, Regulatory Landscape, and Patent Analysis Outlook
- Competitive Intelligence: Market share analysis, financial analysis, product benchmarking, and strategic developments including joint ventures, product launches, and mergers & acquisitions
- Regional attractiveness and related growth opportunities

**Report Customization**

MRFR offers report customization to valued customers. Below are the options available for customization:

- **Company Profiles**
  In-depth profiling of additional market players (3 to 4 companies)

- **Country-Level Analysis**
  Detailed analysis of a country-level market and related segments as per the report scope (subject to data availability)

**Intended Audience**

- Distributors & Suppliers
- Defense Organizations
- End Users
- Consultants and Investment Bankers
- Government as well as independent regulatory authorities

**Contents:**

<table>
<thead>
<tr>
<th>License</th>
<th>Contents</th>
</tr>
</thead>
<tbody>
<tr>
<td>Single User</td>
<td>Enterprise User (Buy Premium Reports Chapterwise)</td>
</tr>
</tbody>
</table>

**TABLE OF CONTENTS**

- **1 EXECUTIVE SUMMARY**
  1.1. Market Attractiveness Analysis
      1.1.2. Global Military Aircraft Digital Glass Cockpit Systems Market, by Aircraft Type
      1.1.3. Global Military Aircraft Digital Glass Cockpit Systems Market, by Region

- **2 MARKET INTRODUCTION**
3 RESEARCH METHODOLOGY
4 MARKET INSIGHTS
5 MARKET DYNAMICS
6 MARKET FACTOR ANALYSIS
7 GLOBAL MILITARY AIRCRAFT DIGITAL GLASS COCKPIT SYSTEMS MARKET, BY SYSTEM
8 GLOBAL MILITARY AIRCRAFT DIGITAL GLASS COCKPIT SYSTEMS MARKET, BY AIRCRAFT TYPE
9 GLOBAL MILITARY AIRCRAFT DIGITAL GLASS COCKPIT SYSTEMS MARKET, BY REGION
10 COMPETITIVE LANDSCAP
11 COMPANY PROFILES
12 APPENDIX
13 LIST OF TABLES
14 LIST OF FIGURES