

Report Information

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Aerostat Systems Market Research Report - Global Forecast till 2030

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Description:

Global Aerostat Systems Market Overview

Aerostat Systems Market Size was valued at USD 11.65 billion in 2022. The Aerostat Systems Market is projected to grow from USD 12.37 billion in 2023 to USD 29.84 billion by 2030, exhibiting a compound annual growth rate (CAGR) of 14.38% during the forecast period (2023 - 2030). Increasing need of surveillance for homeland security, rising demand for persistent Intelligence, Surveillance, and Reconnaissance (ISR) and low operating cost are contributing to the growth of the aerostat systems market. These are just a few of the market drivers that are driving the market.

Aerostat Systems Market Overview

Source Secondary Research, Primary Research, MRFR Database and Analyst Review

Aerostat Systems Market Trends

Increased usage of aerostat systems for surveillance and reconnaissance to propel the market growth.

The major contributing factor driving the growth of the aerostat systems market is the usage of aerostat systems in the military sector specially for surveillance, reconnaissance and gathering information about the enemy along with air strikes. With the decrease in the number of troops being deployed, aerostats systems have become essential for investigation. Through the advancement in aerostat systems, it has become easy for the military forces to protect their borders and there by limiting the risk of soldier's life while gathering enemy's crucial information. The aerostat systems have progressed over the years from being a hardware system to an integrated software systems that are important for the defense and commercial sector. Innovative & new features like surveillance radar, high definition with digital zoom, TV & radio transmissions are being continuously added to these aerostat systems. This rising demand for aerostat systems due to technological advancements in it has mostly propelled the growth of the aerostat systems market. Thus, this factor is driving the market CAGR.

Additionally, several aerospace & defense companies are collaborating and forming joint ventures to expand their operational capabilities is also one of the major factors driving the growth of the aerostat systems market. Companies are entering into joint agreement with other vendors to combine their core strengths and deliver better services to their clients. The government and research agencies across the globe are involved in the R&D activities for the development of these systems. Also, there have been various progresses in the field of aerostat technologies, and a huge military spending for the development such aerostat systems would highly stimulate the aerostat systems market. Thus, it is anticipated that this aspect will accelerate aerostat systems market revenue globally.

Aerostat Systems Market Segment Insights

Aerostat Systems Product Type Insights

The Aerostat Systems Market segmentation, based on product type, includes Hybrid, Airship, Balloon. The Airship segment held the majority share in 2022 in the aerostat systems market data and is projected to be the fast-growing segment in the forecast period as they are attractive alternative to extremely capable but very costly ISTAR-enabled military drones. Airships are widely used for supporting border and several other security missions instead of the smaller commercial UAVs that have size, weight & power challenges. Airships offer great visibility & mobility, attentive time on station, and can fly lower and slower to support the observation and inspection operations in populated areas. Helium filled payload carrying balloons are one of the types of aerostats used, that can offer 24/7 aerial surveillance and communications with increasing safety, reliability, size, and load carrying capacity.

For Instance, May 2022 SoftBank Corp., Japan and Altaeros has launched world's first autonomous aerostat "ST-Flex". This new ST-Flex, is a high-altitude tethered aerostat base station system that can be operated at higher altitudes, can carry heavier communication payloads, and is able to achieve wider area network coverage.

Aerostat Systems Class Insights

The Aerostat Systems Market segmentation, based on class, includes Large-Sized, Medium-Sized, and Compact Size. The large-sized segment dominated the market growth in 2022 and is projected to be the faster-growing segment during the forecast period, 2023-2030. The large-sized segment is expected to generate the highest revenue in the forecast period as these larger systems usually carry heavier, longer-range payloads and can remain airborne in higher altitudes for longer periods of time and in challenging extreme weather conditions than as compared to the smaller aerostats.

Figure 1: Aerostat Systems Market, by Class, 2022 & 2030 (USD Billion)

Source Secondary Research, Primary Research, MRFR Database and Analyst Review

Aerostat Systems Payload Insights

The Aerostat Systems Market data, based on payload, includes Camera, Infrared Sensors, Electronic Intelligence, Navigation System, and Communication Intelligence. The camera segment dominated the aerostat systems market revenue in 2022 and is projected to be the faster-growing segment during the forecast period, 2023-2030. The camera in aerostat systems offers real-time surveillance for a variety of aerial photography applications like security, oil spill response, and environmental monitoring, where the system can be positioned and recovered in a matter of minutes. Camera is the important part of the aerostat systems and is expected to drive the aerostat systems market growth in the forecast period.

For Instance, June 2022 U.S. Customs and Border Protection (CBP) has installed a 22-meter persistent ground surveillance system aerostat in Nogales, Arizona. This aerostat system includes day & night cameras to provide persistent and low-altitude surveillance.

Aerostat Systems Regional Insights

By region, the study provides market insights into North America, Europe, Asia-Pacific, Middle East & Africa, and South America. North America Aerostat Systems Market accounted for USD 4.85 billion in 2022 with a share of around 41.63% and is expected to exhibit a significant CAGR growth during the study period. Increasing in usage of modern airships with flight performance capabilities the region is expected to drive the aerostat systems market growth. These modern airships provide budget efficient aerial monitoring and patrolling. In addition, the increasing focus on research and development activities of aerostat systems, and high demand for cost effective aerial monitoring is also driving the aerostat systems market growth in North America.

Further, the major countries studied in the market report are The U.S, Canada, Germany, France, UK, Italy, Spain, China, Japan, India, Australia, South Korea, and Brazil.

Figure 2: AEROSTAT SYSTEMS MARKET SHARE BY REGION, 2022 & 2030 (USD Billion)

AEROSTAT SYSTEMS MARKET SHARE BY REGION, 2022 & 2030

Source Secondary Research, Primary Research, MRFR Database and Analyst Review

Europe Aerostat Systems Market accounts for the second-largest market share. Increasing demand for aerostat systems by the armed forces for aerial & over-border observation and enhancing homeland security monitoring are driving the growth of the aerostat systems market in Europe. Moreover, Germany Aerostat Systems Market held the largest market share, and the UK Aerostat Systems Market was the fastest growing market in the European region.

Asia Aerostat Systems Market accounts for the third-largest market share as these systems provide great visibility & mobility and are widely used in the region for day-night inspection & monitoring. Further, the China Aerostat Systems Market held the largest market share, and the India Aerostat Systems Market was the fastest growing market in the region.

The Middle East & Africa Aerostat Systems Market is rapidly growing due increase in demand for better threat detection, rapid response coordination and persistent observation at low cost. Also, The South America Aerostat Systems Market has seen a significant progress in the usage of aerostat systems for maritime and port surveillance to detect micro subs or any other traffic.

Aerostat Systems Key Market Players & Competitive Insights

Major market players are spending a lot of money on R&D to increase their product lines, which will help the aerostat systems market grow even more. Market participants are also taking a range of strategic initiatives to grow their worldwide footprint, with key market developments such as new product launches, mergers and acquisitions, contractual agreements, increased investments, and collaboration with other organizations. Competitors in the aerostat systems industry must offer cost-effective items to expand and survive in an increasingly competitive and rising market environment.

One of the primary business strategies adopted by manufacturers in the aerostat systems industry to benefit clients and expand the market sector is to manufacture locally to reduce operating costs. In recent years, aerostat systems industry has provided military & defense with some of the most significant benefits. The aerostat systems market major player such as TCOM LP (US), Aero Drum Ltd (UK), RT LTA Systems Ltd (Israel), Augur RosAeroSystems (Russia), Raytheon Company (US), DRONE Aviation Corp (US), Raven Industries Inc. (US), ILC Dover, LP (US), Lindstrand Technologies Ltd (US).

TCOM, Columbia is the expert in airborne surveillance solutions and only company in the world that is involved in design, installation, and operations of persistent surveillance aerostat systems. The company has its operations in around 18 countries in the world and is offering platform solutions that consist of several classes of aerostats. In July 2022, TCOM Holdings, the parent of TCOM, acquired Aerostar International, Inc., a leading sophisticated sensors and stratospheric balloons company that provides several advantages for wide range of missions.

Key Companies in the Aerostat Systems Market include

- TCOM LP (US)
- Aero Drum Ltd (UK)
- RT LTA Systems Ltd (Israel)
- Augur RosAeroSystems (Russia)
- Raytheon Company (US),
- DRONE Aviation Corp (US),
- Raven Industries Inc. (US),

- ILC Dover, LP (US),
- Lindstrand Technologies Ltd (US)

Aerostat Systems Industry Developments

For Instance, March 2023 RT Aerostat Systems has launched the SkyStar 140, a cellular geo-location-mounted mini-aerostat at DSEI Japan that is capable of rapidly locating the missing and trapped people due to any natural disaster or terror incident.

For Instance, September 2021 TCOM, LP, Columbia, has received a USD 217.3 million contract from the U.S. Army to support the Saudi Arabia multiple tethered aerostat platforms. It is envisioned to support military communications & force protection, intelligence, surveillance, and reconnaissance activities.

Aerostat Systems Market Segmentation

Aerostat Systems Product Type Outlook (USD Billion, 2019-2030)

- Hybrid
- Airship
- Balloon

Aerostat Systems Class Outlook (USD Billion, 2019-2030)

- Large-Sized
- Medium-Sized
- Compact Size

Aerostat Systems Payload Outlook (USD Billion, 2019-2030)

- Camera
- Infrared Sensors
- Electronic Intelligence
- Navigation System
- Communication Intelligence

Aerostat Systems Regional Outlook (USD Billion, 2019-2030)

- North America
 - US
 - Canada
- Europe
 - Germany
 - France
 - UK
 - Italy
 - Spain
 - Rest of Europe
- Asia-Pacific
 - China
 - Japan
 - India
 - Australia

- South Korea
- Rest of Asia-Pacific

- Middle East & Africa
 - South Africa
 - South America
 - Brazil

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