

Report Information

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Airborne ISR Market Research Report - Global Forecast to 2032

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Description:

Global Airborne ISR Market Overview

Airborne ISR Market Size was valued at USD 6.35 billion in 2022. The Airborne ISR market industry is projected to grow from USD 6.66 Billion in 2023 to USD 9.85 billion by 2032, exhibiting a compound annual growth rate (CAGR) of 5.00% during the forecast period (2023 - 2032). ISR techniques and equipment are in greater demand, and more countries are using ISR to secure their borders are the key market drivers enhancing market growth.

Airborne ISR Market Overview

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

Airborne ISR Market Trends

- **Need for airborne ISR equipment is driven by national and international instability, driving the market growth.**

As bilateral militarised conflicts between nations become more frequent, there is an urgent need for national defense forces to bolster their security and situational awareness measures. New technologies and reconnaissance systems are being created to meet the demands of battle. Airborne ISR devices are now part of the defense hardware used in combat operations because of the development of digital battlefields. As a result of these systems, governments' procurement priorities have changed to keep up with changing military requirements. For instance, since 2014, political unrest and terrorism in the Middle East's Iraq and Syria have resulted in military confrontations, with numerous terrorist groups increasingly employing cutting-edge weaponry. To monitor and protect their borders from these cutting-edge weapons, governments in this area are expanding their ISR spending to incorporate new aerial ISR equipment. Saudi Arabia, the UAE, and Qatar are among the nations in this area that have boosted their expenditures on radar and aerial ISR equipment.

ISR (intelligence, surveillance, and reconnaissance) systems carried by aircraft are used to identify friendly and hostile troops and to evaluate the harm done to hostile targets local to a given area. Implementing multi-level comparisons for data management and integrity and advanced data integration might improve the prospects for the sector. Furthermore, increasing government spending on studying and creating improved airborne ISR systems is anticipated to accelerate technological adoption. Additionally, sales are anticipated to increase due to increased demand for unmanned aerial vehicles (UAVs). Thus, this factor is driving the Airborne ISR market CAGR.

A rise in the need for various ISR methods and tools due to their use in various battlefield functions and to support a combat force by utilizing its sensor data while analyzing the gathered information, intelligence, surveillance, and reconnaissance (ISR) techniques and equipment have seen an increase in demand from the defense sector globally. This demand propels the growth of the global airborne intelligence surveillance & reconnaissance market. Additionally, throughout the projected period, the market expansion is anticipated to be fueled by favorable government initiatives to enhance airborne intelligence surveillance & reconnaissance globally.

Disruptive innovations are being produced in the defense sector due to fast technological advancements. Additionally, the anticipated demand for electronic components used in intelligence, surveillance, and reconnaissance (ISR) operations is an increase in the usage of tiny unmanned systems for surveillance. Additionally, as ISR usage grows and more nations use the technology to secure their borders, the airborne ISR market is anticipated to expand considerably. Since more people are becoming aware of intelligence, surveillance, and reconnaissance (ISR) technologies, the market is likely to grow even more throughout the projection period. Thus, this aspect is anticipated to accelerate Airborne ISR market revenue globally.

Airborne ISR Market Segment Insights

Airborne ISR Type Insights

Based on Type, the Airborne ISR Market segmentation includes manned vehicle and Unmanned vehicle. The Unmanned vehicle segment dominated the market, accounting for 35% of market revenue. UAVs are in great demand worldwide because they provide low-cost options to countries wishing to purchase aerial assets for ISR and other tasks. UAVs have established themselves as true instruments for ISR missions.

For instance, the QX-5 and QX-6 modern vertical take-off and landing (VTOL) drones, developed for intelligence, surveillance, and reconnaissance (ISR) applications, border security, and other military operations, were among the new additions to the UAE's government-owned EDGE Group's product portfolio of locally developed advanced unmanned aerial vehicles (UAVs) in November 2021.

Figure 1: Airborne ISR Market, by Type, 2022 & 2032 (USD billion)

Airborne ISR Market, by Type, 2022 & 2032

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

Airborne ISR Application Insights

Based on Application, the Airborne ISR Market segmentation includes Signals Intelligence, Maritime Patrol, Airborne Ground Surveillance and Airborne Early Warnings. The Airborne Ground Surveillance category generated the most income. One of the key drivers of the global growth of airborne ISR systems is the integration of search radars across many military platforms, including ground, naval, and airborne. Diverse military forces are making significant investments in acquiring and placing radars, particularly in high-tension and isolated areas. These radars facilitate the signal processing for ISR systems installed on various aircraft platforms.

Airborne ISR Regional Insights

By Region, the study provides market insights into North America, Europe, Asia-Pacific and the Rest of the World. North America Airborne ISR market accounted for USD 2.90 billion in 2022 and is expected to exhibit a significant CAGR growth during the study period. The United States and Canada dominate the regional market in North America. The profitability and growth rates in this area are very strong. The U.S. will collaborate and acquire more airborne ISR throughout the anticipated period.

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

Figure 2: AIRBORNE ISR MARKET SHARE BY REGION 2022 (%)

AIRBORNE ISR MARKET SHARE BY REGION 2022

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

The Europe airborne ISR market in the world is the second-largest market. The market is advancing due to the high levels of investment in these sectors. As a result of growing military modernization initiatives and the entry of cutting-edge military technology from the United Kingdom, Russia, France, and other countries. Further, the Germany Airborne ISR market held the largest market share, and the U.K. Airborne ISR market was the fastest-growing market in the European Region.

During the forecast period, the Asia Pacific airborne ISR market is anticipated to develop at the highest CAGR. China, India, Japan, Australia, South Korea, and the rest of Asia Pacific are all included in this regional market research. To tackle threats from regional wars, nations including China, India, Japan, South Korea, Taiwan, and Australia are upgrading their battle zone systems by investing in air defense systems. Important challenges in the Region include the conflicts over the South China Sea, North Korea's expanding nuclear weapons, the border dispute between India and Pakistan, and turmoil in Afghanistan. Airborne ISR capabilities are necessary for border monitoring, intelligence collection, and critical infrastructure security. Moreover, the China Airborne ISR market held the largest market share, and the India Airborne ISR market was the fastest-growing market in the Asia-Pacific region.

Airborne ISR Key Market Players & Competitive Insights

Leading industry companies are making significant R&D investments to broaden their product offerings, which will spur further expansion of the market for Airborne ISR products. Important market developments include new product releases, contractual agreements, mergers and acquisitions, greater investments, and collaboration with other organizations. Market participants also engage in several strategic actions to increase their worldwide presence. The Airborne ISR industry must offer products at reasonable prices to grow and thrive in a more cutthroat and competitive environment.

One of the primary business strategies manufacturers employ in the worldwide Airborne ISR industry to benefit customers and expand the market sector is local manufacturing to reduce operating costs. The Airborne ISR industry has recently provided some of the most important benefits. Major players in the Airborne ISR market, including Boeing (U.S.), BAE Systems (U.K.), Elbit Systems Ltd (Israel), FLIR Systems Inc (U.S.), Northrop Grumman (U.S.), General Dynamics (U.S.), Thales (France), Raytheon (U.S.), UTC Aerospace Systems (U.S.), and others, are attempting to increase market demand by investing in research and development operations.

The Boeing Company (/bo/) is an American multinational company that develops, produces, and markets aircraft, helicopters, rockets, satellites, telecommunications gear, and missiles globally. Additionally, the business offers leasing and customer support services. Boeing has plans to relocate its corporate headquarters from Chicago to Arlington, Virginia, a suburb of Washington, D.C., in May 2022. According to the corporation, the location's "proximity to our customers and stakeholders, as well as its access to world-class engineering and technical talent," played a role in this choice.

An American multinational aerospace and defense technology firm is called Northrop Grumman Corporation. Northrop Grumman stated in August 2022 that it was shifting the manufacturing of the engines and structures for its Antares rockets from Russia and Ukraine to the United States. The Antares manufacturing will be transferred to the United States through a collaboration with the Texas-based Firefly Aerospace. To power the Antares 230+ series, Northrop Grumman had bought Russian RD-181 engines, while Yuzhmash State Enterprise of Ukraine produced the rocket's main body.

Key Companies in the Airborne ISR market include

- Boeing (U.S.)
- BAE Systems (U.K.)
- Elbit Systems Ltd (Israel)
- FLIR Systems Inc (U.S.)
- Northrop Grumman (U.S.)
- General Dynamics (U.S.)
- Thales (France)
- Raytheon (U.S.)
- UTC Aerospace Systems (U.S.)

Airborne ISR Industry Developments

- **October 2021:** The 20th and 21st of October 2021 will see the 6th Airborne ISR conference in London, which SMI is hosting. The 6th Annual Airborne ISR Conference from SMI will explore in-depth themes, including maritime patrol, data dissemination, UAV technology, international surveillance cooperation, AWACS, 5th Generation ISR, industrial engagement, and threat evolution.
- **June 2021:** A new iteration of the HADES intelligence, surveillance, and reconnaissance (ISR) Multi-Domain Sensing System (MDSS) has been contracted by the U.S. Army with L3 and Raytheon to demonstrate, develop, build, and integrate prototype electronic intelligence (ELINT) and communications intelligence (COMINT) sensors.

Airborne ISR Market Segmentation

Airborne ISR Type Outlook

- Unmanned vehicle
- Manned vehicle

Airborne ISR Application Outlook

- Signals Intelligence
- Maritime Patrol
- Airborne Ground Surveillance
- Airborne Early Warnings

Airborne ISR Regional Outlook

- North America
 - US
 - Canada

- Europe
 - Germany
 - France
 - UK
 - Italy
 - Spain
 - Rest of Europe

- Asia-Pacific
 - China
 - Japan
 - India
 - Australia
 - South Korea
 - Australia
 - Rest of Asia-Pacific

- Rest of the World
 - Middle East
 - Africa
 - Latin America

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