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Electronic Warfare Market Research Report—Global Forecast till 2030

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Description:

Global Electronic Warfare Market Overview

Electronic Warfare Market Size was valued at USD 15.5 billion in 2022. The Electronic Warfare Market industry is projected to grow from USD 16.12 Billion in 2023 to USD 20.43 billion by 2030, exhibiting a compound annual growth rate (CAGR) of 4.03% during the forecast period (2023 - 2030). Increase in the Use of EW Equipment Due to Drone Threats and Remotely Triggered IEDs and Warfare Equipment Use Increased as a result; Cyber Operations are the key market drivers enhancing market growth for electronic Warfare.

Electronic Warfare Market Overview

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

Electronic Warfare Market Trends

Warfare Equipment Use Increased as a result of the Use of Cyber Operations market growth

Military forces operate in cyberspace, using electromagnetic energy and wireless computer networks to coordinate various operations. They employ sensors on the ground and in the air to find the enemy. They converse with one another via radios and jam enemy radars with electronic devices to prevent communication. Every computer network, cyberspace, and the electromagnetic spectrum now function as one continuous, coherent environment thanks to wireless routers or tactical radios. Military operations depend heavily on the electromagnetic spectrum and the information environment known as cyberspace. It must be treated equally to the conventional spheres of land, sea, air, and space.

Convergence is a concept that refers to the combination of traditional and wireless commercial services and applications. Cyberspace and the electromagnetic spectrum will be used in concert to win future wars. Thus, this factor is driving the market CAGR for electronic Warfare.

These systems have returned due to changes in security, threat perception, and conflict dynamics. Countries have worked to make rapid advancements in this area during times of conflict. The U. S. Israel, Turkey, the U.S., Russia, China, and China. K. and a few other European nations had advantages in recent conflict zones. They have demonstrated that threats do not always originate from military hardware. Pressure on other nations is increasing using novel techniques like hybrid Warfare and asymmetric Warfare tactics. These systems will be a key component of future security measures given the growing prevalence of the use of electronic systems in hybrid and asymmetrical conflicts are another factor driving the growth of the Electronic Warfare Market revenue.

Electronic Warfare Market Segment Insights

Electronic Warfare Type Insights

The Electronic Warfare Market segmentation, based on Category, includes Electronic Attack (EA), Electronic Support (ES), and Electronic Protection (EP). The Electronic Attack (EA) segment held the majority share in 2022, contributing to the Electronic Warfare Market revenue. Electronic Attack dominates as a result of the rise in the threat from IEDs and threats from the sea. Due to a rise in the demand for sophisticated surveillance, reconnaissance, and intelligence equipment, the electronic support segment displayed the highest CAGR.

For instance, October 2022 To address surveillance challenges across all levels of tactical operations, Saab AB introduced the Sirius compact, a passive lightweight EW sensor. Sirius compact locates threats while remaining undetected.

Electronic Warfare Type Insights

Based on Product, the Electronic Warfare Market segmentation includes Jammers, Countermeasure Systems, Decoy, Directed Energy weapons, 2G Antennas, 3 G Antennas, 4G Antennas, 5G Antennas, and others. The Jammers segment dominated the market in 2022 and is projected to be the faster-growing segment during the forecast period, 2022-2030. Armed with handheld and mobile jammers, military forces worldwide are preparing for battle. The development of more compact, lightweight personal protection equipment will be made easier by the growing emphasis on portable Warfare systems, which will enhance warfighting capabilities. Furthermore, current trends are increasingly focused on creating jammers that can selectively and reactively jam signals. The emphasis on jamming and identifying radar and other electronic signals will sharpen as sea-based operations are expected to increase over the forecast period implants for Electronic Warfare positively impacts the market growth for electronic Warfare.

Electronic Warfare Platform Insights

The Electronic Warfare Market data has been bifurcated by Platform into Land-based, Airborne, and Naval. The minimally invasive spine surgery segment dominated the market in 2022 and is projected to be the faster-growing segment during the forecast period 2022-2030. Due to increased military spending on bolstering border defense capabilities to fend off terrorist attacks, the land-based segment is expected to expand.

Over the forecast period, the air-based segment had the highest CAGR. Combat aircraft, Airborne Early Warning and Control (AEW). Submarines and ships make up the second division of the maritime segment. As various countries' defense sectors buy more combat aircraft and unmanned aerial vehicles, the air-based platform is anticipated to grow faster during the forecast period.

Figure 2: Electronic Warfare Market, by Platform, 2022 & 2030 (USD Billion)

Electronic Warfare Market, by Platform, 2022 & 2030

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

Electronic Warfare Regional Insights

By Region, the study provides market insights for electronic Warfare into North America, Europe, Asia-Pacific, and the Rest of the World. The North American Electronic Warfare Market accounted for USD 7.099 billion in 2022 and is expected to exhibit a significant CAGR growth during the study period. The increase is attributed to the United States' highest defense spending in the Department of Defense. U.S., in 2022, a defense budget of USD 782 billion was allocated. By 2021, the U.S. 45 Electronic Warfare programs across the military service departments and other platforms were given USD 3.17 billion by the government.

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

Figure 3: ELECTRONIC WARFARE MARKET SHARE BY REGION 2022 (%)

ELECTRONIC WARFARE MARKET SHARE BY REGION 2022

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

Europe’s Electronic Warfare Market accounts for the second-largest market share due to increased investment in cutting-edge military technology and the presence of important key players like Thales Group. Increasing defense spending from developed nations like Russia, the U.K., France, Germany, and other countries spurs market expansion. Further, the Germany Electronic Warfare Market held the largest market share, and the UK Electronic Warfare Market was the fastest-growing market in the European region.

The Asia-Pacific Electronic Warfare Market is expected to grow at the fastest CAGR from 2022 to 2030. Rising defense spending from nations like India, China, Japan, and Australia is credited with the region's expansion. The Indian Air Force intends to create a sophisticated Electronic Warfare suite for its fighter aircraft fleet. To provide the Indian Air Force with cutting-edge fighter aircraft with these capabilities, the Indian defense ministry signed a contract with Bharat Electronics Limited (BEL). Moreover, China’s Electronic Warfare Market held the largest market share, and the India Electronic Warfare Industry was the fastest-growing market in the Asia-Pacific region.

Electronic Warfare Key Market Players & Competitive Insights

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

One of the primary business strategies manufacturers adopt in the Electronic Warfare industry to benefit clients and expand the market sector is manufacturing locally to reduce operating costs. The Electronic Warfare industry has provided medicine with some of the most significant benefits in recent years. The Electronic Warfare Market major players such as Saab AB (Sweden), General Dynamics Corporation (US), BAE Systems (UK), Raytheon Technologies Corporation (US), Lockheed Martin Corporation (US), Thales Group (France), Northrop Grumman Corporation (US), HENSOLDT (Germany), and others are working on expanding the market demand by investing in research and development activities.

Saab AB provides the international market with industry-leading goods, services, and solutions ranging from civil security to military defense. The market offering of Saab is extensive and includes both services with a high degree of repetition and complex systems that require significant research and development. With operations on every continent, Saab continuously creates, modifies, and enhances new technology to satisfy the varying demands of its clients.

Also, BAE Systems (UK), our cutting-edge defense technology at BAE Systems, safeguards vital data and infrastructure while preserving individual and public safety. We look for fresh approaches to give our customers a competitive edge in the air, sea, land, and cyberspace. We collaborate closely with local partners to support economic development by transferring knowledge, skills, and technology. We have a skilled workforce of 90,500 employees across more than 40 countries.

Key Companies in the Electronic Warfare Market include

- Saab AB (Sweden)
- General Dynamics Corporation (US)
- BAE Systems (UK)
- Raytheon Technologies Corporation (US)
- Lockheed Martin Corporation (US)
- Thales Group (France)
- Northrop Grumman Corporation (US)
- HENSOLDT (Germany)

- Boeing (US)
- Leonardo SpA (Italy)

Electronic Warfare Industry Developments

For Instance, May 2022 The U.S. government awarded a contract to Northrop Grumman Corporation. S. The AN/ALQ-257 Integrated Viper Electronic Warfare Suite (IVEWS) will continue to be prepared by the Air Force for developmental testing and complete hardware qualification.

For Instance, May 2022 Three software programs from third parties were successfully flight tested by BAE Systems using its Scalable Adaptive Bank of Electronic Resources (SABER) technology. Compass Call's core technology is this. The next-generation electromagnetic attack weapon system Compass Call interferes with enemy radar, navigation, and command and control communications.

For Instance, May 2022 Advanced off-board EW systems were the subject of a contract from Lockheed Martin to CAES LRIP1. It supports the system's capability to detect an incoming missile, assess its trajectory, and then transmit countermeasure techniques to divert the missile, whether working independently or with the ship's onboard electronic surveillance sensor equipped with CAES antennas.

Electronic Warfare Market Segmentation

Electronic Warfare Category Outlook

- Electronic Attack (EA)
- Electronic Support (ES)
- Electronic Protection (EP)

Electronic Warfare Product Outlook

- Jammers
- Countermeasure System
- Decoy
- Directed Energy Weapon
- 2G Antennas
- 3G Antennas
- 4G Antennas
- 5G Antennas
- others

Electronic Warfare Platform Outlook

- Land-based
- Airborne
- Naval

Electronic Warfare 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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