

Report Information

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Surveillance Radar Market Research Report - Forecast till 2030

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Description:

Global Surveillance Radar Market Overview

Surveillance Radar Market Size was valued at USD 6.25billion in 2022. The Surveillance Radar market industry is projected to grow from USD6.874375 billion in 2023 to USD 12.17173341 billion by 2030, exhibiting a compound annual growth rate (CAGR) of 9.99% during the forecast period (2023 - 2030). Increasing Fleet of Commercial Aircraft and Airports, Increased defense expenditures, and Demand for Advanced border surveillance systems, are the key market driver enhancing market growth.

Surveillance Radar Market Overview

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

Surveillance Radar Market Trends

- **Advancement in Border Surveillance Systems is driving market growth.**

Border surveillance systems have evolved with time and continue to make significant advancements, such as autonomous drones and acoustic radar technologies. Portable ground surveillance radars for border security have enabled various countries to secure their borders more efficiently. Moreover, these surveillance radars are deployed in strategic locations to increase detection rates. Furthermore, state-of-the-art surveillance radars with low false alarms have led countries with border disputes, drug trafficking problems, and illegal immigration to rely on these advanced radars to assist in border protection. For instance, according to an article published by CNET in February 2019, the U.S. government is considering a spending bill worth \$100 million to fund the installation of border surveillance systems, such as fixed towers, remote video surveillance systems, and mobile surveillance systems, on its northern border. Thus, all these development in surveillance technologies acts as an opportunity for the growth of the surveillance radars market CAGR.

Additionally, Growing commercial airports and aircraft fleets and concerns about reducing carbon emissions through effective traffic management will drive market expansion. The Indian government has constructed about 18 new airports in the last two years. The government of India's Civil Aviation Minister also declared that 220 new airports would be built by 2025. As a result, there is a rapidly growing need for airport surveillance radars for aircraft traffic management, command, and control. That drives the surveillance market revenue.

Surveillance Radar Market Segment Insights

Surveillance Radar Type Insights

Based on type, the surveillance radar market segmentation includes battlefield surveillance radars, ground-based space surveillance radars, ground-based air surveillance radars, coastal surveillance radars, airport surveillance radars, air-to-air surveillance radars, space-based radars, and shipborne surveillance radars. Due to the increased demand for Advanced border surveillance systems, the battlefield surveillance radars segment accounted for the highest Surveillance Radar market share in 2022. The Airport Surveillance Radars segment is expected to grow over the forecast period due to the increased use of surveillance radars in airports and military space monitoring applications.

Surveillance Radar Component Insights

Based on Components, the surveillance radar market data includes antennas, transmitters,

duplexers, power amplifiers, receivers, and others. The antennas segment accounted for the highest surveillance radar market. The antenna transfers the transmitter energy at the required efficiency. This process is carried out identically during the reception. The antenna can be a parabolic reflector, planar array, or electronically steered phased array. The antenna is a crucial component of the radar system. Transmitters witness the highest growth in the forecasted period. Transmitters include power amplifiers such as klystrons, power oscillators such as magnetrons, and traveling wave tubes. The Duplexers segment is expected the growth in the forecast period. The duplexer alternately switches the antenna between the transmitter and receiver, so only one antenna needs to be used. A duplexer allows the antenna to be used as a transmitter and a receiver.

The receivers segment is expected to witness growth during the forecast period, 2022 to 2030. The receiver amplifies and demodulates the received RF signals and projects a video signal. Radar sensor systems use superheterodyne receivers or other receivers to process and detect the signal.

Surveillance Radar Platform Insights

Based on By Platform, the Surveillance Radar market segmentation includes Land, Naval, Airborne, and Space. The land segment dominated the surveillance radar market. The land-based radar systems are largely used for border surveillance, critical infrastructure protection, and to protect military bases. The Naval segment is expected to witness high growth during the forecast period. This is due to military agencies' increasing adoption of maritime surveillance radar systems ly. The airborne segment is expected to register the highest CAGR during the forecast period. The airborne radar systems make use of unmanned aerial vehicles and helicopters. The sensors mounted on these platforms detect and continuously monitor, record, and analyze activity on the ground. The Space segment is expected to witness steady growth during the forecast period. Space-based surveillance radar systems offer intelligence and reconnaissance capabilities.

Figure 1: Surveillance Radar Market, By Platform, 2022 & 2030 (USD billion)
Surveillance Radar Market, By Platform, 2022 & 2030

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

Surveillance Radar Product Frequency Band Insights

Based on product type, the surveillance radar industry includes UHF- & VHF-bands, L-band, C-band, S-band, and X-band. UHF- & VHF-bands segments dominated the market. BCB provides wide beam coverage and higher throughput in comparison with lower bands. They suffer from rain fading due to the absorption of electromagnetic waves by the rain.

For Instance July 2022 On the NAM Atlântico multipurpose aircraft carrier operated by the Brazilian Navy, BAE was given a five-year contract for the ARTISAN radar. The DNA2 Combat Management System (CMS) and ARTISAN radar on NAM Atlântico received lifetime support as part of the contract.

Surveillance Radar Regional Insights

By Region, the study provides market insights into North America, Europe, Asia-Pacific, and the Rest of the World. North American surveillance radar market, an increasing fleet of commercial aircraft and airports, and increased defense expenditures will boost the market growth in this Region.

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

Figure 2: SURVEILLANCE RADAR MARKET SHARE BY REGION 2022 (%)

SURVEILLANCE RADAR MARKET SHARE BY REGION 2022

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

Europe's surveillance radar market accounts for the second-largest market share due to the increased investments from the commercial and defense industries. Further, the German surveillance radar industry held the largest market share, and the UK surveillance radar industry was the fastest-growing market in the European Region.

The Asia-Pacific surveillance radar market is expected to grow at the fastest CAGR from 2023 to 2030. This is due to ongoing territorial issues, along with the transformation of countries, like China and India, into significant aviation hubs in the Region, which are anticipated to boost the procurements of new surveillance radars. Moreover, China's surveillance radar industry held the largest market share, and the Indian surveillance radar market was the fastest-growing market in the Asia-Pacific region.

Surveillance Radar Key Market Players & Competitive Insights

Leading market players are investing heavily in research and development to expand their product lines, which will help the Surveillance Radar market grow even more. Market participants are also undertaking various strategic activities to expand their footprint, with important market developments including new product launches, contractual agreements, mergers and acquisitions, higher investments, and collaboration with other organizations. The surveillance radar industry must offer cost-effective items to expand and survive in a more competitive and rising market climate.

Manufacturing locally to minimize operational costs is one of the key business tactics manufacturers

use in the surveillance radar industry to benefit clients and increase the market sector. In recent years, the surveillance radar industry has offered the military some of the most significant advantages. Major players in the surveillance radar market, including Aselsan AS (Turkey), Blighter Surveillance Systems Ltd (UK), DeTect Inc. (US), Elbit Systems Ltd. (Israel), Flir Systems Inc. (US), GEM Elettronica (Italy), L3 Harris Technologies (US), Israel Aerospace Industries Ltd (Israel), Leonardo Spa (Italy), Lockheed Martin Corporation (US) and others, are attempting to increase market demand by investing in research and development operations.

Hensoldt AG is a multinational corporation headquartered in Germany, focusing on sensor technologies for protection and surveillance missions in the defense, security, and aerospace sectors. The main product areas are radar, optoelectronics, and avionics. HENSOLDT introduced a new radar product line the Quadome radar system for naval surveillance and target acquisition at DSEi. The new radar systems can strengthen situational awareness and provide fast reaction times to the naval forces.

Mahindra Telephonics Integrated Systems Limited is a multinational corporation headquartered in India focusing on Imaging & Surveillance Radar, Identification Friend or Foe (IFF), Search, Rescue & Weather Avoidance Radar, Ground Surveillance, Air Traffic Control (ATC), Ground Surveillance, Air Traffic Control (ATC), Sensor Solution. Mahindra Telephonic Integrated Systems Ltd. was awarded a contract worth INR 323.47 crore by the Indian Defence Ministry to deliver and install 11 airport surveillance radars with monopulse secondary surveillance radar for the Indian Navy and Indian Coast Guard. The contract was awarded under the Buy & Make category. The new radar installation is anticipated to enhance the air domain awareness around airfields and increase safety & efficiency in the flying operations of the Indian Navy and Indian Coast Guard.

Key Companies in the Surveillance Radar market include.

- EAselsan AS (Turkey)
- Blighter Surveillance Systems Ltd (UK)
- Detect Inc. (US)
- Elbit Systems Ltd. (Israel)
- Flir Systems Inc. (US)
- GEM Elettronica (Italy)
- L3 Harris Technologies (US)
- Israel Aerospace Industries Ltd (Israel)
- Leonardo Spa (Italy)
- Lockheed Martin Corporation (US)

Surveillance Radar Industry Developments

For Instance, September 2021 HENSOLDT introduced a new radar product line the Quadome radar system for naval surveillance and target acquisition at DSEi. The new radar systems can strengthen situational awareness and provide fast reaction times to the naval forces.

For Instance, June 2021 Mahindra Telephonic Integrated Systems Ltd. was awarded a contract worth INR 323.47 crore by the Indian Defence Ministry to deliver and install 11 airport surveillance radars with monopulse secondary surveillance radar for the Indian Navy and Indian Coast Guard. The contract was awarded under the Buy & Make category. The new radar installation is anticipated to enhance the air domain awareness around airfields and increase safety & efficiency in the flying operations of the Indian Navy and Indian Coast Guard.

Surveillance Radar Market Segmentation

Surveillance RadarType Outlook

- Battlefield Surveillance Radars
- Ground-Based Space Surveillance Radars
- Ground-Based Air Surveillance Radars
- Coastal Surveillance Radars
- Airport Surveillance Radars
- Air-To-Air Surveillance Radars
- Space-Based Radars

- Shipborne Surveillance Radars

Surveillance Radar Component Outlook

- Antennas
- Transmitters
- Duplexers
- Power Amplifiers
- Receivers
- Others

Surveillance Radar Platform Outlook

- Land
- Naval
- Airborne
- Space

Surveillance Frequency Band Outlook

- UHF- & VHF-Bands
- L-Band
- C-Band
- S-Band
- X-Band
- Hard Armor

Surveillance Radar 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

Table of Content:

Contents

Table of Contents

1. EXECUTIVE SUMMARY

- 1.1. MARKET ATTRACTIVENESS ANALYSIS
 - 1.1.1. GLOBAL SURVEILLANCE RADAR MARKET, BY TYPE
 - 1.1.2. GLOBAL SURVEILLANCE RADAR MARKET, BY COMPONENT
 - 1.1.3. GLOBAL SURVEILLANCE RADAR MARKET, BY PLATFORM
 - 1.1.4. GLOBAL SURVEILLANCE RADAR MARKET, BY FREQUENCY BAND
 - 1.1.5. GLOBAL SURVEILLANCE RADAR MARKET, BY APPLICATION
 - 1.1.6. GLOBAL SURVEILLANCE RADAR MARKET, BY REGION

2. MARKET INTRODUCTION

- 2.1. MARKET DEFINITION
- 2.2. SCOPE OF THE STUDY
- 2.3. MARKET STRUCTURE
- 2.4. KEY BUYING CRITERIA
- 2.5. MARKET FACTOR INDICATOR ANALYSIS

3. RESEARCH METHODOLOGY

- 3.1. RESEARCH PROCESS
- 3.2. PRIMARY RESEARCH
- 3.3. SECONDARY RESEARCH
- 3.4. MARKET SIZE ESTIMATION
- 3.5. FORECAST MODEL
- 3.6. LIST OF ASSUMPTIONS

4. MARKET INSIGHTS

5. MARKET DYNAMICS

- 5.1. INTRODUCTION
- 5.2. DRIVERS
 - 5.2.1. ADVANCEMENT IN BORDER SURVEILLANCE SYSTEMS
 - 5.2.2. INCREASING DEFENSE EXPENDITURE
 - 5.2.3. INCREASING NEED FOR MISSILE DETECTION SYSTEMS
 - 5.2.4. DRIVERS IMPACT ANALYSIS
- 5.3. RESTRAINTS
 - 5.3.1. HIGH COSTS OF INSTALLATION AND OPERATION
 - 5.3.2. RESTRAINT IMPACT ANALYSIS
- 5.4. OPPORTUNITIES
 - 5.4.1. INCREASED INVESTMENTS IN ADVANCED SURVEILLANCE TECHNOLOGIES
- 5.5. MARKET/TECHNOLOGICAL TRENDS
- 5.6. PATENT TRENDS
- 5.7. REGULATORY LANDSCAPE/STANDARDS

6. MARKET FACTOR ANALYSIS

- 6.1. VALUE CHAIN/SUPPLY CHAIN ANALYSIS
 - 6.1.1. R&D
 - 6.1.2. MANUFACTURING
 - 6.1.3. DISTRIBUTION & SALES
 - 6.1.4. POST-SALES MONITORING
- 6.2. PORTER'S FIVE FORCES ANALYSIS
 - 6.2.1. THREAT OF NEW ENTRANTS
 - 6.2.2. BARGAINING POWER OF BUYERS
 - 6.2.3. THREAT OF SUBSTITUTES
 - 6.2.4. SEGMENT RIVALRY
- 6.2.5. BARGAINING POWER OF SUPPLIES

7. GLOBAL SURVEILLANCE RADAR MARKET, BY TYPE

- 7.1. INTRODUCTION
- 7.2. BATTLEFIELD SURVEILLANCE RADARS
- 7.3. GROUND-BASED SPACE SURVEILLANCE RADARS
- 7.4. GROUND-BASED AIR SURVEILLANCE RADARS
- 7.5. COASTAL SURVEILLANCE RADARS
- 7.6. AIRPORT SURVEILLANCE RADARS
- 7.7. AIRBORNE MARITIME SURVEILLANCE RADARS
- 7.8. AIR-TO-GROUND SURVEILLANCE RADARS
- 7.9. AIR-TO-AIR SURVEILLANCE RADARS
- 7.10. SPACE-BASED RADARS
- 7.11. SHIPBORNE SURVEILLANCE RADARS

8. GLOBAL SURVEILLANCE RADAR MARKET, BY COMPONENT

- 8.1. INTRODUCTION
- 8.2. ANTENNAS
- 8.3. TRANSMITTERS
- 8.4. DUPLEXERS
- 8.5. POWER AMPLIFIERS
- 8.6. RECEIVERS
- 8.7. OTHERS

9. GLOBAL SURVEILLANCE RADAR MARKET, BY PLATFORM

9.1. INTRODUCTION

9.2. LAND

9.3. NAVAL

9.4. AIRBORNE

9.5. SPACE

10. GLOBAL SURVEILLANCE RADAR MARKET, BY FREQUENCY BAND

10.1. INTRODUCTION

10.2. UHF- & VHF-BANDS

10.3. L-BAND

10.4. C-BAND

10.5. S-BAND

10.6. X-BAND

10.7. K-, KU, AND KA-BANDS

11. GLOBAL SURVEILLANCE RADAR MARKET, BY APPLICATION

11.1. INTRODUCTION

11.2. COMMERCIAL

11.2.1. AIRSPACE MONITORING & SURVEILLANCE

11.2.2. AIRPORT PERIMETER SECURITY

11.2.3. CRITICAL INFRASTRUCTURES

11.3. NATIONAL SECURITY

11.3.1. BORDER SURVEILLANCE

11.3.2. SEARCH & RESCUE

11.4. DEFENSE & SPACE

11.4.1. PERIMETER SECURITY

11.4.2. ISR & BATTLEFIELD SURVEILLANCE

11.4.3. AIR DEFENSE

12. GLOBAL SURVEILLANCE RADAR MARKET, BY REGION

12.1. INTRODUCTION

12.2. NORTH AMERICA

12.2.1. US

12.2.2. CANADA

12.3. EUROPE

12.3.1. UK

12.3.2. GERMANY

12.3.3. FRANCE

12.3.4. ITALY

12.3.5. REST OF EUROPE

12.4. ASIA-PACIFIC

12.4.1. CHINA

12.4.2. JAPAN

12.4.3. INDIA

12.4.4. AUSTRALIA

12.4.5. REST OF ASIA-PACIFIC

12.5. MIDDLE EAST & AFRICA

12.5.1. SAUDI ARABIA

12.5.2. UAE

12.5.3. REST OF MIDDLE EAST & AFRICA

12.6. LATIN AMERICA

12.6.1. BRAZIL

12.6.2. REST OF LATIN AMERICA

13. COMPETITIVE LANDSCAPE

13.1. COMPETITIVE OVERVIEW

13.2. COMPETITOR DASHBOARD

13.3. MAJOR GROWTH KEY STRATEGIES IN THE GLOBAL SURVEILLANCE RADAR MARKET

13.4. COMPETITIVE BENCHMARKING

13.5. MARKET SHARE ANALYSIS

13.6. LEADING PLAYER IN TERMS OF THE NUMBER OF DEVELOPMENTS IN THE GLOBAL SURVEILLANCE RADAR MARKET

13.7. KEY DEVELOPMENTS & GROWTH STRATEGIES

13.7.1. NEW PRODUCT LAUNCH/SERVICE COMPONENT

13.7.2. MERGER & ACQUISITION

13.7.3. JOINT VENTURES

14. COMPANY PROFILES

14.1. KEY MARKET PLAYERS

(COMPANY OVERVIEW, FINANCIAL UPDATES, PRODUCTS & SERVICE OFFERED, KEY DEVELOPMENTS, SWOT ANALYSIS, AND KEY STRATEGIES TO BE PROVIDED FOR ALL THE LISTED COMPANIES)

14.1.1. ASELSAN AS

14.1.2. BLIGHTER SURVEILLANCE SYSTEMS LTD.

14.1.3. DETECT INC.

14.1.4. ELBIT SYSTEMS LTD.

14.1.5. FLIR SYSTEMS, INC.

14.1.6. GEM ELETTRONICA

14.1.7. HARRIS CORPORATION

14.1.8. ISRAEL AEROSPACE INDUSTRIES LTD.

14.1.9. LEONARDO SPA

14.1.10. LOCKHEED MARTIN CORPORATION

14.2. OTHER PROMINENT PLAYERS

14.2.1. HENSOLDT

14.2.2. HONEYWELL INC.

14.2.3. RAYTHEON COMPANY

14.2.4. SAAB AB

14.2.5. THALES GROUP

15. APPENDIX

15.1. REFERENCES

15.2. RELATED REPORTS

15.3. LIST OF ABBREVIATION

LIST OF TABLES

TABLE 1 LIST OF ASSUMPTIONS

TABLE 2 MAJOR PATENTS GRANTED FOR SURVEILLANCE RADAR (2015–2023)

TABLE 3 TYPE: GLOBAL SURVEILLANCE RADAR MARKET, 2023-2030 (USD MILLION)

TABLE 4 COMPONENT: GLOBAL SURVEILLANCE RADAR MARKET, 2023-2030 (USD MILLION)

TABLE 5 PLATFORM: GLOBAL SURVEILLANCE RADAR MARKET, 2023-2030 (USD MILLION)

[illegible]

TABLE 90 MIDDLE EAST & AFRICA: SURVEILLANCE RADAR MARKET, BY PLATFORM, 2023-2030 (USD MILLION)
TABLE 91 MIDDLE EAST & AFRICA: SURVEILLANCE RADAR MARKET, BY FREQUENCY BAND, 2023-2030 (USD MILLION)
TABLE 92 MIDDLE EAST & AFRICA: SURVEILLANCE RADAR MARKET, BY APPLICATION, 2023-2030 (USD MILLION)
TABLE 93 SAUDI ARABIA: SURVEILLANCE RADAR MARKET, BY TYPE, 2023-2030 (USD MILLION)
TABLE 94 SAUDI ARABIA: SURVEILLANCE RADAR MARKET, BY COMPONENT, 2023-2030 (USD MILLION)
TABLE 95 SAUDI ARABIA: SURVEILLANCE RADAR MARKET, BY PLATFORM, 2023-2030 (USD MILLION)
TABLE 96 SAUDI ARABIA: SURVEILLANCE RADAR MARKET, BY FREQUENCY BAND, 2023-2030 (USD MILLION)
TABLE 97 SAUDI ARABIA: SURVEILLANCE RADAR MARKET, BY APPLICATION, 2023-2030 (USD MILLION)
TABLE 98 UAE: SURVEILLANCE RADAR MARKET, BY TYPE, 2023-2030 (USD MILLION)
TABLE 99 UAE: SURVEILLANCE RADAR MARKET, BY COMPONENT, 2023-2030 (USD MILLION)
TABLE 100 UAE: SURVEILLANCE RADAR MARKET, BY PLATFORM, 2023-2030 (USD MILLION)
TABLE 101 UAE: SURVEILLANCE RADAR MARKET, BY FREQUENCY BAND, 2023-2030 (USD MILLION)
TABLE 102 UAE: SURVEILLANCE RADAR MARKET, BY APPLICATION, 2023-2030 (USD MILLION)
TABLE 103 REST OF THE MIDDLE EAST & AFRICA: SURVEILLANCE RADAR MARKET, BY INSTALLATION BASE, 2023-2030 (USD MILLION)
TABLE 104 REST OF THE MIDDLE EAST & AFRICA: SURVEILLANCE RADAR MARKET, BY COMPONENT, 2023-2030 (USD MILLION)
TABLE 105 REST OF THE MIDDLE EAST & AFRICA: SURVEILLANCE RADAR MARKET, BY PLATFORM, 2023-2030 (USD MILLION)
TABLE 106 REST OF THE MIDDLE EAST & AFRICA: SURVEILLANCE RADAR MARKET, BY FREQUENCY BAND, 2023-2030 (USD MILLION)
TABLE 107 REST OF THE MIDDLE EAST & AFRICA: SURVEILLANCE RADAR MARKET, BY APPLICATION, 2023-2030 (USD MILLION)
TABLE 108 LATIN AMERICA: SURVEILLANCE RADAR MARKET, BY COUNTRY, 2023-2030 (USD MILLION)
TABLE 109 LATIN AMERICA: SURVEILLANCE RADAR MARKET, BY TYPE, 2023-2030 (USD MILLION)
TABLE 110 LATIN AMERICA: SURVEILLANCE RADAR MARKET, BY COMPONENT, 2023-2030 (USD MILLION)
TABLE 111 LATIN AMERICA: SURVEILLANCE RADAR MARKET, BY PLATFORM, 2023-2030 (USD MILLION)
TABLE 112 LATIN AMERICA: SURVEILLANCE RADAR MARKET, BY FREQUENCY BAND, 2023-2030 (USD MILLION)
TABLE 113 LATIN AMERICA: SURVEILLANCE RADAR MARKET, BY APPLICATION, 2023-2030 (USD MILLION)
TABLE 114 BRAZIL: SURVEILLANCE RADAR MARKET, BY TYPE, 2023-2030 (USD MILLION)
TABLE 115 BRAZIL: SURVEILLANCE RADAR MARKET, BY COMPONENT, 2023-2030 (USD MILLION)
TABLE 116 BRAZIL: SURVEILLANCE RADAR MARKET, BY PLATFORM, 2023-2030 (USD MILLION)
TABLE 117 BRAZIL: SURVEILLANCE RADAR MARKET, BY FREQUENCY BAND, 2023-2030 (USD MILLION)
TABLE 118 BRAZIL: SURVEILLANCE RADAR MARKET, BY APPLICATION, 2023-2030 (USD MILLION)
TABLE 119 REST OF LATIN AMERICA: SURVEILLANCE RADAR MARKET, BY TYPE, 2023-2030 (USD MILLION)
TABLE 120 REST OF LATIN AMERICA: SURVEILLANCE RADAR MARKET, BY COMPONENT, 2023-2030 (USD MILLION)
TABLE 121 REST OF LATIN AMERICA: SURVEILLANCE RADAR MARKET, BY FREQUENCY- BAND, 2023-2030 (USD MILLION)
TABLE 122 REST OF LATIN AMERICA: SURVEILLANCE RADAR MARKET, BY FREQUENCY BAND, 2023-2030 (USD MILLION)
TABLE 123 REST OF LATIN AMERICA: SURVEILLANCE RADAR MARKET, BY APPLICATION, 2023-2030 (USD MILLION)
TABLE 124 THE MOST ACTIVE PLAYERS IN THE GLOBAL SURVEILLANCE RADAR MARKET
TABLE 125 CONTRACTS AND AGREEMENTS
TABLE 126 MERGERS AND ACQUISITIONS
TABLE 127 PRODUCT DEVELOPMENTS
TABLE 128 EXPANSIONS AND INVESTMENTS
TABLE 129 JOINT VENTURES AND PARTNERSHIPS
LIST OF FIGURES
FIGURE 1 MARKET SYNOPSIS
FIGURE 2 GLOBAL SURVEILLANCE RADAR MARKET: MARKET ATTRACTIVENESS ANALYSIS
FIGURE 3 GLOBAL SURVEILLANCE RADAR MARKET ANALYSIS, BY TYPE
FIGURE 4 GLOBAL SURVEILLANCE RADAR MARKET ANALYSIS, BY COMPONENT
FIGURE 5 GLOBAL SURVEILLANCE RADAR MARKET ANALYSIS, BY PLATFORM
FIGURE 6 GLOBAL SURVEILLANCE RADAR MARKET ANALYSIS, BY FREQUENCY BAND
FIGURE 7 GLOBAL SURVEILLANCE RADAR MARKET ANALYSIS, BY APPLICATION
FIGURE 8 GLOBAL SURVEILLANCE RADAR MARKET ANALYSIS, BY REGION
FIGURE 9 GLOBAL SURVEILLANCE RADAR MARKET: MARKET STRUCTURE
FIGURE 10 KEY BUYING CRITERIA FOR SURVEILLANCE RADAR TYPES
FIGURE 11 RESEARCH PROCESS OF MRFR
FIGURE 12 NORTH AMERICA: MARKET SIZE & MARKET SHARE, BY COUNTRY, 2023 VS 2030
FIGURE 13 EUROPE: MARKET SIZE & MARKET SHARE, BY COUNTRY, 2023 VS 2030
FIGURE 14 ASIA-PACIFIC: MARKET SIZE & MARKET SHARE, BY COUNTRY, 2023 VS 2030
FIGURE 15 MIDDLE EAST & AFRICA: MARKET SIZE & MARKET SHARE, BY COUNTRY, 2023 VS 2030
FIGURE 16 LATIN AMERICA: MARKET SIZE & MARKET SHARE, BY REGION, 2023 VS 2030
FIGURE 17 MARKET DYNAMICS OVERVIEW
FIGURE 18 DRIVERS IMPACT ANALYSIS: GLOBAL SURVEILLANCE RADAR MARKET
FIGURE 19 RESTRAINTS IMPACT ANALYSIS: GLOBAL SURVEILLANCE RADAR MARKET
FIGURE 20 PORTER'S FIVE FORCES ANALYSIS OF THE GLOBAL SURVEILLANCE RADAR MARKET
FIGURE 21 SUPPLY CHAIN: GLOBAL SURVEILLANCE RADAR MARKET
FIGURE 22 GLOBAL SURVEILLANCE RADAR MARKET SHARE, BY TYPE, 2023 (% SHARE)
FIGURE 23 GLOBAL SURVEILLANCE RADAR MARKET SHARE, BY COMPONENT, 2023 (% SHARE)
FIGURE 24 GLOBAL SURVEILLANCE RADAR MARKET SHARE, BY PLATFORM, 2023 (% SHARE)
FIGURE 25 GLOBAL SURVEILLANCE RADAR MARKET SHARE, BY FREQUENCY BAND, 2023 (% SHARE)
FIGURE 26 GLOBAL SURVEILLANCE RADAR MARKET SHARE, BY APPLICATION, 2023 (% SHARE)
FIGURE 27 GLOBAL SURVEILLANCE RADAR MARKET SHARE, BY REGION, 2023 (% SHARE)
FIGURE 28 NORTH AMERICA: SURVEILLANCE RADAR MARKET SHARE, BY COUNTRY, 2023 (% SHARE)
FIGURE 29 EUROPE: SURVEILLANCE RADAR MARKET SHARE, BY COUNTRY, 2023 (% SHARE)
FIGURE 30 ASIA-PACIFIC: SURVEILLANCE RADAR MARKET SHARE, BY COUNTRY, 2023 (% SHARE)
FIGURE 31 MIDDLE EAST & AFRICA: SURVEILLANCE RADAR MARKET SHARE, BY COUNTRY, 2023 (% SHARE)
FIGURE 32 LATIN AMERICA: SURVEILLANCE RADAR MARKET SHARE, BY COUNTRY, 2023 (% SHARE)
FIGURE 33 COMPETITOR DASHBOARD: GLOBAL SURVEILLANCE RADAR MARKET
FIGURE 34 CAPITAL MARKET RATIO AND FINANCIAL MATRIX
FIGURE 35 CONTRACTS & AGREEMENTS: THE MAJOR STRATEGY ADOPTED BY KEY PLAYERS IN THE GLOBAL SURVEILLANCE RADAR MARKET
FIGURE 36 BENCHMARKING OF MAJOR COMPETITORS

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