

Airborne ISR Market By Solution (System, Service, Software) , By Application (Search and Rescue Operations, Border and Maritime Patrol, Target Acquisition and Tracking, Critical Infrastructure Protection, Tactical Support, Others) By End User (Defense, Homeland, Security) : Global Opportunity Analysis and Industry Forecast, 2024-2033

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Abstracts

Airborne ISR Market

The airborne ISR market was valued at \$12.7 billion in 2023 and is projected to reach \$20.3 billion by 2033, growing at a CAGR of 4.8% from 2024 to 2033.

Airborne intelligence, surveillance, and reconnaissance (ISR) involves the use of unmanned & manned aircraft equipped with cutting-edge sensors & technologies. These aircraft are deployed over a designated area to monitor & collect real-time information through radar, camera, and electronic sensors. Airborne ISR finds applications in diverse defense and non-military activities, including border patrol, military reconnaissance, disaster response, intelligence gathering, and environmental monitoring.

Global surge in expenditure on military & defense infrastructure owing to various countries striving to strengthen their surveillance capabilities and national security is a key driver of the airborne ISR market. In addition, constant innovations in unmanned aerial vehicles have boosted their competence to perform defense operations, augmenting the development of the market. To achieve actionable intelligence and accelerate the decision-making process in the military, the integration of AI & ML

algorithms into airborne ISR is becoming a notable trend. The ability of the algorithm to assimilate the data sequentially is anticipated to eliminate uncertainty in defense-related decisions, enabling instant actions at appropriate times.

However, the utility of airborne ISR is subject to stringent airspace restrictions that vary from one region to another. Lack of clarity regarding the regulations and insufficiency in compliance with them hampers the development of the market. Moreover, the high vulnerability of aircraft integrated with latest digital technologies toward cyberattacks, jamming, and hacking restrains the market growth. On the contrary, rise in the usage of aircraft for disaster relief and management is poised to present lucrative opportunities for the airborne ISR market. According to the Center for Research on the Epidemiology of Disasters, approximately 93.1 million individuals were affected by natural disasters in 2023, claiming around 86,473 lives globally. As the threat of natural disasters continues to increase due to rapid climatic changes, the demand for airborne ISRs is projected to witness a notable surge in the future.

Segment Review

The airborne ISR market is segmented into solution, application, end user, and region. On the basis of solution, the market is segmented into system, service, and software. Depending on application, it is classified into search & rescue operations, border & maritime patrol, target acquisition & tracking, critical infrastructure protection, tactical support, and others. By end user, it is categorized into defense, homeland, and security. Region wise, it is analyzed across North America, Europe, Asia-Pacific, and LAMEA.

Key Findings

On the basis of solution, the system segment held a high share of the market in 2023.

Depending on application, the border & maritime patrol segment acquired a high stake in the market in 2023.

By end user, the defense segment dominated the market in 2023.

Region wise, Asia-Pacific was the highest revenue generator in 2023.

Competition Analysis

The major players in the global airborne ISR market include AE Systems PLC, Elbit

Systems, L3Harris Technologies, Inc., Northrop Grumman Corporation, Lockheed Martin Corporation, Raytheon Company, Thales Group, Boeing Company, General Atomics Aeronautical Systems, and Israel Aerospace Industries. These major players have adopted various key development strategies such as business expansion, new product launches, and partnerships to strengthen their foothold in the competitive market.

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Pain Point Analysis

Additional company profiles with specific to client's interest

Historic market data

SWOT Analysis

Key Market Segments

By Solution

System

Service

Software

By Application

Search and Rescue Operations

Border and Maritime Patrol

Target Acquisition and Tracking

Critical Infrastructure Protection

Tactical Support

Others

By End User

Defense

Homeland

Security

By Region

North America

U.S.

Canada

Mexico

Europe

France

Germany

Italy

Spain

UK

Russia

Rest of Europe

Asia-Pacific

China

Japan

India

South Korea

Australia

Thailand

Malaysia

Indonesia

Rest of Asia-Pacific

LAMEA

Brazil

South Africa

Saudi Arabia

UAE

Argentina

Rest of LAMEA

Key Market Players

AE Systems PLC

Elbit Systems

L3Harris Technologies, Inc

Northrop Grumman Corporation

Lockheed Martin Corporation

Raytheon Company

Thales Group

Boeing Company (The)

General Atomics Aeronautical Systems

Israel Aerospace Industries

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