

Global Combat System Integration Market Size Study & Forecast, by Platform, System Integration, Combat Capabilities, Data Connectivity, and Regional Forecasts 2025-2035

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Abstracts

The Global Combat System Integration Market is valued at approximately USD 23.07 billion in 2024 and is anticipated to witness a consistent CAGR of 5.00% during the forecast period from 2025 to 2035. As modern military forces race to enhance operational coordination, real-time decision-making, and battlefield superiority, combat system integration has emerged as the linchpin of next-generation defense strategies. This complex process involves the unification of weapons, sensors, communications, and command systems across land, air, and sea platforms to ensure seamless interoperability. The intensifying nature of global conflicts and geopolitical rivalries is propelling a surge in demand for highly synchronized combat environments, pushing governments to invest heavily in integrated technologies. These investments are channeled toward transforming disparate military assets into cohesive, agile, and data-driven warfighting ecosystems.

The growing focus on multi-domain operations and network-centric warfare has necessitated the evolution of command-and-control systems that can ingest, process, and distribute battlefield intelligence across a variety of platforms. This shift is particularly visible in the widespread deployment of tactical data links such as Link 11/16 and cooperative engagement capabilities (CEC) that enable real-time threat assessments and precision strike coordination. Additionally, nations are increasingly integrating sensor suites with weapon systems to bolster anti-air, anti-surface, and anti-submarine warfare capabilities. Amid this rapid technological convergence, the maritime and airborne sectors remain the largest consumers of combat integration systems, with platforms like submarines and naval helicopters requiring enhanced survivability and

mission adaptability. However, the complexity and high cost of retrofitting legacy systems remain notable challenges in markets with budget constraints or older fleet infrastructure.

From a geographical standpoint, North America commanded a significant share of the market in 2024, spearheaded by the United States' commitment to military modernization and its strategic dominance in networked defense systems. The region benefits from robust defense funding, advanced R&D capabilities, and long-standing collaborations between the Department of Defense and key defense contractors. Meanwhile, the Asia Pacific region is anticipated to witness the fastest growth through 2035, driven by increased defense budgets, regional security tensions, and the rapid militarization of countries such as China, India, South Korea, and Japan. Europe continues to play a pivotal role with NATO-led modernization programs and increasing cross-border collaboration in integrated naval and aerospace defense. The Middle East and Africa, although smaller in market size, are ramping up investments in advanced systems integration to defend strategic maritime zones and counter unconventional threats.

Major market player included in this report are:

BAE Systems plc

Lockheed Martin Corporation

Northrop Grumman Corporation

Raytheon Technologies Corporation

Saab AB

Thales Group

Leonardo S.p.A.

General Dynamics Corporation

L3Harris Technologies, Inc.

Elbit Systems Ltd.

Boeing Defense, Space & Security

Honeywell International Inc.

Rheinmetall AG

Naval Group

Bharat Electronics Limited (BEL)

Global Combat System Integration Market Report Scope:

Historical Data – 2023, 2024

Base Year for Estimation – 2024

Forecast period - 2025-2035

Report Coverage - Revenue forecast, Company Ranking, Competitive Landscape, Growth factors, and Trends

Regional Scope - North America; Europe; Asia Pacific; Latin America; Middle East & Africa

Customization Scope - Free report customization (equivalent up to 8 analysts' working hours) with purchase. Addition or alteration to country, regional & segment scope*

The objective of the study is to define market sizes of different segments & countries in recent years and to forecast the values for the coming years. The report is designed to incorporate both qualitative and quantitative aspects of the industry within the countries involved in the study. The report also provides detailed information about crucial aspects, such as driving factors and challenges, which will define the future growth of the market. Additionally, it incorporates potential opportunities in micro-markets for stakeholders to invest, along with a detailed analysis of the competitive landscape and product offerings of key players. The detailed segments and sub-segments of the

market are explained below:

By Platform:

Surface Ships

Submarines

Airborne Platforms

By System Integration:

Weapons Integration

Sensors Integration

Command and Control Integration

By Combat Capabilities:

Anti-Air Warfare

Anti-Surface Warfare

Anti-Submarine Warfare

Electronic Warfare

By Data Connectivity:

Link 11/16 Data Exchange

Tactical Data Link (TDL)

Cooperative Engagement Capability (CEC)

By Region:

North America

U.S.

Canada

Europe

UK

Germany

France

Spain

Italy

ROE

Asia Pacific

China

India

Japan

Australia

South Korea

RoAPAC

Latin America

Brazil

Mexico

Middle East & Africa

UAE

Saudi Arabia

South Africa

Rest of Middle East & Africa

Key Takeaways:

Market Estimates & Forecast for 10 years from 2025 to 2035.

Annualized revenues and regional level analysis for each market segment.

Detailed analysis of geographical landscape with Country level analysis of major regions.

Competitive landscape with information on major players in the market.

Analysis of key business strategies and recommendations on future market approach.

Analysis of competitive structure of the market.

Demand side and supply side analysis of the market.

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