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Global Defense Electronics Market Size Study, by Platform (Airborne, Space, Land, Marine) by Vertical (Optronics, Communication and Display, C4ISR, Electronic Warfare, Radar, Navigation) and Regional Forecasts 2022-2032

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Abstracts

The Global Defense Electronics Market is valued approximately at USD 159.02 billion in 2023 and is anticipated to grow with a healthy growth rate of more than 5.87% over the forecast period 2024-2032. Defense electronics encompass a broad range of electronic systems, tools, and technologies developed for military and national defense purposes. These technologies provide essential functions such as surveillance, communication, navigation, reconnaissance, and countermeasure systems, enhancing the strategic and tactical capabilities of modern military operations. The resurgence in air travel and ongoing aircraft modernization contracts across commercial and military sectors are further bolstering market growth. Increased R&D efforts aimed at improving fuel efficiency and reducing carbon footprints in aviation also contribute to the market's growth during the forecast period 2024-2032.

The surge in adoption of electronic warfare (EW) technologies and counter-unmanned aerial systems (UAS) is a pivotal driver of market growth. With responsibilities assigned to unmanned systems increasing, the demand for EW technologies to counter these systems has also escalated. Additionally, significant military spending by countries such as China and India propels the development and acquisition of advanced electronic warfare equipment. For instance, China increased its military budget to USD 293 billion in 2021, reflecting the growing emphasis on EW capabilities. Moreover, the need for electronic warfare systems has grown due to heightened military spending and the quest for technological superiority. The advancement of space-based C4ISR capabilities is critical for global armed forces, driven by investments in small satellites

that offer cost-effective and scalable operations. However, compliance with stringent regulations and export controls poses significant challenges for defense electronics manufacturers, potentially hindering market expansion.

The key regions considered for the global defense electronics market study include Asia Pacific, North America, Europe, Latin America, and the Rest of the World. In 2023, Asia-Pacific is expected to dominate the market and projected to grow at significant rate during the forecast period 2024-2032, driven by increasing military expenditures and the integration of advanced technologies across various defense platforms. Rapid economic growth and increasing defense budgets in countries such as China, India, Japan, and South Korea are significant contributors. These nations are investing heavily in modernizing their military capabilities, focusing on advanced electronics for communication, surveillance, and combat systems. The regional geopolitical tensions and security challenges also propel the demand for innovative defense electronics. Furthermore, the presence of a robust manufacturing base, coupled with advancements in technology and innovation, supports the production of sophisticated defense electronics systems. The Asia-Pacific region is also seeing significant collaborations and partnerships between domestic companies and global defense electronics firms, enhancing the technological capabilities and market reach. As a result, the Asia-Pacific is expected to lead the global defense electronics market, driven by strong economic growth, substantial defense investments, and a focus on technological advancement.

Major market players included in this report are:

Lockheed Martin Corporation

Northrop Grumman Corporation

Raytheon Technologies Corporation

Thales Group

BAE Systems

Aselsan AS

Curtis-Wright Corporation

L3Harris Technologies

Boeing

Teledyne Defense Electronics

The detailed segments and sub-segment of the market are explained below:

By Platform:

Airborne

Space

Land

Marine

By Vertical:

Optronics

Communication and Display

C4ISR

Electronic Warfare

Radar

Navigation

By Region:

North America

U.S.

Canada

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Europe

UK

Germany

France

Russia

Italy

Spain

Rest of Europe

Asia Pacific

China

India

Japan

Australia

South Korea

Rest of Asia Pacific

Latin America

Brazil

Mexico

Rest of Latin America

Middle East & Africa

Saudi Arabia

South Africa

Rest of Middle East & Africa

Years considered for the study are as follows:

Historical year – 2022

Base year – 2023

Forecast period – 2024 to 2032

Key Takeaways:

Market Estimates & Forecast for 10 years from 2022 to 2032.

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.

Contents

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List Of Tables

LIST OF TABLES

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List Of Figures

LIST OF FIGURES

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