

Global Military Electro-Optics/Infrared (EO/IR) Systems Market Size study & Forecast, by Product Type, Platform, Component, Cooling Technology, Sensor Technology, Imaging Technology, Point of Sale and Regional Forecasts 2025-2035

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Abstracts

The Global Military Electro-Optics/Infrared (EO/IR) Systems Market is valued approximately at USD 8.11 billion in 2024 and is poised to grow at a CAGR of 4.00% during the forecast period 2025-2035. EO/IR systems are advanced imaging and targeting technologies utilized by modern defense forces to enhance situational awareness, reconnaissance capabilities, and precision targeting in diverse combat environments. These systems integrate electro-optical sensors and infrared technology to capture high-resolution imagery, identify targets under all lighting conditions, and support real-time surveillance. As the nature of modern warfare evolves—becoming increasingly asymmetric and technology-driven—the demand for compact, agile, and multi-functional EO/IR systems across handheld, airborne, land, and naval platforms has surged exponentially.

Fueled by global defense modernization programs, the proliferation of unmanned systems, and a growing emphasis on precision-strike capabilities, EO/IR systems have emerged as indispensable assets on the battlefield. Militaries around the world are equipping their fleets with next-generation targeting pods, sensor suites, and multi-spectral vision systems capable of operating across varied atmospheric and combat conditions. The incorporation of advanced technologies such as AI-powered object recognition, fused imagery, and thermal detection has significantly elevated the operational effectiveness of these systems. Moreover, the shift from cooled to uncooled infrared sensors in portable solutions has driven cost efficiency and widespread adoption across tactical units. With rising security threats and increasing demand for

ISR (Intelligence, Surveillance, Reconnaissance) superiority, the EO/IR systems market is witnessing sustained investments and technology collaborations.

Regionally, North America holds a commanding share in the global EO/IR systems market, driven by the U.S. Department of Defense's continued push for next-gen ISR and targeting systems across platforms such as drones, fighter jets, armored vehicles, and naval vessels. The U.S. military's focus on enhancing multi-domain operations has catalyzed EO/IR upgrades in manned and unmanned systems alike. Meanwhile, the Asia Pacific region is poised to witness the fastest growth over the forecast period due to rising defense expenditures in nations such as China, India, Japan, and South Korea. The region's intensifying cross-border tensions, military modernization plans, and increasing indigenous development of surveillance technologies are major contributors. Additionally, Europe is reinforcing its defense readiness by investing in sensor fusion technologies and cross-border EO/IR integration initiatives under NATO frameworks.

Major market player included in this report are:

Leonardo S.p.A

FLIR Systems Inc.

L3Harris Technologies Inc.

Thales Group

BAE Systems plc

Northrop Grumman Corporation

Raytheon Technologies Corporation

Elbit Systems Ltd.

Lockheed Martin Corporation

Rheinmetall AG

Hensoldt AG

ASELSAN A.S.

Teledyne Technologies Inc.

Safran Group

Collins Aerospace

Global Military Electro-Optics/Infrared (EO/IR) Systems 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 Product Type:

Handheld Systems

EO/IR Payloads

By Platform:

Air

Naval

Ground

By Component:

Sensors

Processors

Displays

Cameras

Others

By Cooling Technology:

Cooled

Uncooled

By Sensor Technology:

Staring Sensor

Scanning Sensor

By Imaging Technology:

Multispectral Imaging

Hyperspectral Imaging

By Point of Sale:

OEM

Aftermarket

By Region:

North America

U.S.

Canada

Europe

UK

Germany

France

Spain

Italy

Rest of Europe

Asia Pacific

China

India

Japan

Australia

South Korea

Rest of Asia Pacific

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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