

Global Airspace Surveillance Radar Market Research Report 2026(Status and Outlook)

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Abstracts

The 2025 U.S. tariff policies introduce profound uncertainty into the global economic landscape. This report critically examines the implications of recent tariff adjustments and international strategic countermeasures on Airspace Surveillance Radar competitive dynamics, regional economic interdependencies, and supply chain reconfigurations. Global airspace surveillance radar sales are expected to reach approximately 450 units in 2024, with the average price of a system around \$3.9 million per unit. The industry's average gross profit margin is approximately 28%-35%. These radars are designed for wide-area surveillance supporting air traffic management (with a single-unit effective detection radius typically 60 nautical miles, expandable to 200+ nautical miles). They typically offer 360° azimuth coverage, a main-lobe half-power angle of approximately 0.5-2°, a rotation rate of 6-12 rpm (corresponding to an update period of 5-10 seconds), pulse/coherent Doppler or AESA transmission architecture, and peak output power ranging from tens to hundreds of kW (depending on the civilian/military application). The pulse repetition frequency (PRF) and pulse width are programmable to balance near- and long-range resolution. They can cover ground altitudes above 40,000 feet and support multi-target tracking (MTI/FFT and modern trajectory fusion) for simultaneous processing of hundreds to thousands of targets. Upstream components include RF front-ends and power amplifiers, phased array/rotating antenna mechanical components, high-speed signal processing FPGAs/CPU's, cooling systems, and precision test equipment. Downstream customers include air traffic control and airport operators, defense and air force headquarters, airspace management agencies, maritime and border control units, and system integrators. In terms of application, a medium-sized civil air traffic control radar station typically has one radar station as the primary surveillance/auxiliary fusion node, while large regional networks are deployed in clusters (typically 3-8 radar stations in parallel per air zone for overlapping coverage). Technology trends focus on AESA/digital

beamforming, multi-source data fusion with ADS-B/MLAT/satellite links, edge AI for target recognition and false target suppression, and higher energy efficiency and modular maintenance designs. Fluctuations in upstream RF and semiconductor prices and the pace of defense/civil aviation procurement directly impact delivery cycles. Czech manufacturer ELDIS PARDUBICE has mass production capabilities in this market segment, with an estimated annual production capacity of approximately 30 radar units for civil and tactical applications. Supply Situation Upstream raw materials include high-frequency microwave components, solid-state transmit/receive modules (TRMs), low-loss antenna substrates, carbon fiber radomes, and digital signal processing boards. Raw material costs account for approximately 48% of the total system cost. Major suppliers include Rogers Corporation, Analog Devices, Qorvo, DuPont, and Hexcel. Manufacturer Features Hensoldt is a leading European manufacturer of integrated air traffic control and air defense radars, with its flagship Twinvis series being used by airports in Germany and Finland. Raytheon's ASR-11 series has over 400 units deployed by the US Federal Aviation Administration. ELDIS Pardubice specializes in Central European air traffic control systems, with an annual production capacity of approximately 30 units, primarily serving airport traffic surveillance networks in the Czech Republic, Poland, and Southeast Asia. Case Study In March 2025, ELDIS PARDUBICE sold an RL-2000/80 airspace surveillance radar equipped with a monopulse secondary surveillance radar to Mahindra Telephonics Integrated Systems in India to support its airspace management, quoting \$1.75 million. Applications Civil air traffic control and airport management account for the largest share, with clients including key global air traffic control and airport management organizations such as the FAA, Eurocontrol, Civil Aviation Authority UK, CAAC, and Airservices Australia. In the air defense and sovereign airspace monitoring sector, clients include national defense and airspace defense forces such as the U.S. Air Force, the German Bundeswehr, the Indian Ministry of Defense, the Israel Defense Forces, and the Chinese Air Force. In the border and coastal surveillance sector, clients include the Indian Coast Guard and the Finmeccanica Coast Guard of Italy, among other border and coastal security agencies. These diverse application areas together constitute its diverse application landscape. Technology Trends Airspace surveillance radars are evolving towards solid-state active electronically scanned array (AESA), AI-powered automatic target recognition, ADS-B fusion surveillance, and fully digital beamforming. Next-generation systems generally adopt a C/S dual-frequency, multi-channel design to address target resolution in complex weather conditions. Deep learning-based radar signal interpretation models are introduced at the algorithm level, reducing false alarm rates by up to 40%. Furthermore, modular architecture and remote software upgrades are becoming new standards, and dual-use systems are also on the rise. Market Factors This market growth is strongly driven by the rapid increase in global air traffic,

the modernization of airport infrastructure, and stricter air traffic control safety regulations. The International Civil Aviation Organization (ICAO) and the European Union's EASA have imposed stricter requirements for low-altitude drone surveillance and flight flow monitoring, significantly increasing demand for upgraded airspace surveillance radars. However, the market remains constrained by high capital and operating costs, complex integration with existing systems, and long regulatory and approval cycles in various countries. Fluctuations in upstream high-frequency electronic materials and power modules have a direct impact on system costs, while downstream factors such as airport expansion, defense procurement budgets, and regional security dynamics determine the pace of demand. Overall, the airspace surveillance radar market is in a period of structural upgrade from traditional analog to fully digital radar networks. Military-civilian integration and multimodal detection will be the core development directions in the next five years.

The global Airspace Surveillance Radar market size was estimated at USD 1755.0 million in 2025 and is projected to grow at a compound annual growth rate (CAGR) of 6.50% during the forecast period.

This report offers a comprehensive and in-depth analysis of the global Airspace Surveillance Radar market, covering all critical facets from a broad macroeconomic overview to detailed micro-level insights. It examines market size, competitive landscape, emerging development trends, niche segments, key drivers and challenges, as well as conducts SWOT and value chain analyses.

The insights provided enable readers to understand the competitive dynamics within the industry and formulate effective strategies to enhance profitability and market positioning. Additionally, the report presents a clear framework for evaluating the current status and future outlook of business organizations operating in this sector.

A significant focus of this report lies in the competitive landscape of the global Airspace Surveillance Radar market. It offers detailed profiles of major players, including their market shares, performance metrics, product portfolios, and operational status. This enables stakeholders to identify leading competitors and gain a nuanced understanding of market rivalry and structure.

In summary, this report serves as an essential resource for industry participants, investors, researchers, consultants, and business strategists, as well as anyone planning to enter or expand their presence in the Airspace Surveillance Radar market.

Global Airspace Surveillance Radar Market: Market Segmentation Analysis

This research report provides a detailed segmentation of the market by region (country), key manufacturers, product type, and application. Market segmentation divides the overall market into distinct subsets based on factors such as product categories, end-user industries, geographic locations, and other relevant criteria.

A clear understanding of these market segments enables decision-makers to tailor their product development, sales, and marketing strategies more effectively to meet the unique needs of each segment. Leveraging market segmentation insights can significantly enhance targeted approaches, optimize resource allocation, and accelerate product innovation cycles by aligning offerings with the specific demands of diverse customer groups.

Key Company

Hensoldt
Westinghouse
SRC
Raytheon
Indra
Lockheed Martin
Weibel
L3Harris
Leonardo
Thales
IAI Elta Systems
ELDIS Pardubice
Northrop Grumman
Shoghi Communications

Market Segmentation (by Type)

60 NM
80 NM
120 NM
240NM

Market Segmentation (by Application)

Military Airports

Civil Airports

Geographic Segmentation

North America (USA, Canada, Mexico)

Europe (Germany, UK, France, Russia, Italy, Rest of Europe)

Asia-Pacific (China, Japan, South Korea, India, Southeast Asia, Rest of Asia-Pacific)

South America (Brazil, Argentina, Columbia, Rest of South America)

The Middle East and Africa (Saudi Arabia, UAE, Egypt, Nigeria, South Africa, Rest of MEA)

Key Benefits of This Market Research:

Industry drivers, restraints, and opportunities covered in the study

Neutral perspective on the market performance

Recent industry trends and developments

Competitive landscape & strategies of key players

Potential & niche segments and regions exhibiting promising growth covered

Historical, current, and projected market size, in terms of value

In-depth analysis of the Airspace Surveillance Radar Market

Overview of the regional outlook of the Airspace Surveillance Radar Market:

Customization of the Report

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Chapter Outline

Chapter 1 mainly introduces the statistical scope of the report, market division standards, and market research methods.

Chapter 2 is an executive summary of different market segments (by region, product type, application, etc), including the market size of each market segment, future development potential, and so on. It offers a high-level view of the current state of the Airspace Surveillance Radar Market and its likely evolution in the short to mid-term, and long term.

Chapter 3 makes a detailed analysis of the market's competitive landscape of the market and provides the market share, capacity, output, price, latest development plan, merger, and acquisition information of the main manufacturers in the market.

Chapter 4 is the analysis of the whole market industrial chain, including the upstream and downstream of the industry, as well as Porter's five forces analysis.

Chapter 5 introduces the latest developments of the market, the driving factors and restrictive factors of the market, the challenges and risks faced by manufacturers in the industry, and the analysis of relevant policies in the industry.

Chapter 6 provides the analysis of various market segments according to product types, covering the market size and development potential of each market segment, to help readers find the blue ocean market in different market segments.

Chapter 7 provides the analysis of various market segments according to application, covering the market size and development potential of each market segment, to help readers find the blue ocean market in different downstream markets.

Chapter 8 provides a quantitative analysis of the market size and development potential of each region and its main countries and introduces the market development, future development prospects, market space, and capacity of each country in the world.

Chapter 9 shares the main producing countries of Airspace Surveillance Radar, their output value, profit level, regional supply, production capacity layout, etc. from the supply side.

Chapter 10 introduces the basic situation of the main companies in the market in detail, including product sales revenue, sales volume, price, gross profit margin, market share, product introduction, recent development, etc.

Chapter 11 provides a quantitative analysis of the market size and development potential of each region in the next five years.

Chapter 12 provides a quantitative analysis of the market size and development potential of each market segment in the next five years.

Chapter 13 is the main points and conclusions of the report.

Key Reasons to Buy this Report:

Access to date statistics compiled by our researchers. These provide you with historical and forecast data, which is analyzed to tell you why your market is set to change

This enables you to anticipate market changes to remain ahead of your competitors

You will be able to copy data from the Excel spreadsheet straight into your marketing plans, business presentations, or other strategic documents

The concise analysis, clear graph, and table format will enable you to pinpoint the information you require quickly

Provision of market value data for each segment and sub-segment

Indicates the region and segment that is expected to witness the fastest growth as well as to dominate the market

Analysis by geography highlighting the consumption of the product/service in the region as well as indicating the factors that are affecting the market within each region

Competitive landscape which incorporates the market ranking of the major players, along with new service/product launches, partnerships, business expansions, and acquisitions in the past five years of companies profiled

Extensive company profiles comprising of company overview, company insights, product benchmarking, and SWOT analysis for the major market players

The current as well as the future market outlook of the industry concerning recent developments which involve growth opportunities and drivers as well as challenges and restraints of both emerging as well as developed regions

Includes in-depth analysis of the market from various perspectives through Porter's five forces analysis

Provides insight into the market through Value Chain

Market dynamics scenario, along with growth opportunities of the market in the years to come

6-month post-sales analyst support

Customization of the Report

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