

Global Airborne Radio Monitoring and Direction-Finding System Market 2026 by Manufacturers, Regions, Type and Application, Forecast to 2032

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Abstracts

According to our (Global Info Research) latest study, the global Airborne Radio Monitoring and Direction-Finding System market size was valued at US\$ 1615 million in 2025 and is forecast to a readjusted size of US\$ 2565 million by 2032 with a CAGR of 6.7% during review period.

An airborne radio monitoring and direction-finding system refers to a missionized RF sensing, spectrum monitoring, signal detection, communications intelligence, direction-finding, emitter geolocation and mission-processing system installed on manned aircraft, unmanned aircraft, helicopters, aerostats, tethered balloons or other airborne platforms. A typical system consists of wideband monitoring receivers, direction-finding antenna arrays, RF front ends, software-defined radio modules, digital signal processing units, GNSS/time synchronization modules, airborne mission computers, mission management software, data links and ground-based processing software. The system is designed to detect, analyze, record, classify and geolocate radio-frequency emitters across relevant frequency bands and is mainly used for spectrum enforcement, interference hunting, low-altitude electromagnetic environment monitoring, border and maritime surveillance, communications intelligence, electronic support and tactical ISR missions.

Based on our research, the airborne radio monitoring and direction-finding system market sits at the intersection of spectrum monitoring, radio direction finding, communications intelligence and airborne ISR. Compared with fixed monitoring stations and vehicle-mounted systems, airborne platforms provide superior radio line-of-sight and can cover border areas, coastlines, islands, mountains, maritime zones and low-altitude airspace more efficiently. Compared with traditional strategic SIGINT aircraft,

newer UAV-mounted, podded and low-SWaP payloads lower the deployment threshold and expand the addressable user base. The most important analytical boundary is to keep the market focused on RF monitoring, DF, COMINT/C-ESM payloads, mission software and directly bundled ground-processing elements. Aircraft platforms, airborne early warning radars, EO/IR sensors and pure jamming systems should not be counted in the narrow revenue model.

Demand is still value-led by military electronic warfare and ISR programs, where a single mission suite can be worth far more than a large number of small civil monitoring payloads. At the same time, civil and quasi-civil demand is growing as low-altitude airspace management, UAV regulation, event security, border surveillance, maritime monitoring, spectrum enforcement and interference hunting become more important. Historically, civil regulators relied mainly on fixed and mobile ground stations. Airborne systems are now being used as a complementary layer in terrain-constrained areas, offshore environments, temporary events, microwave-link inspections and dense UAV operating zones where rapid deployment and broad coverage matter.

Technologically, the market is shifting from a small number of large dedicated reconnaissance aircraft toward a layered architecture consisting of strategic aircraft mission suites, special-mission aircraft pods, MALE/HALE UAV payloads and small drone-mounted spectrum monitoring or DF payloads. Hardware performance in receivers, RF front ends and DF antennas remains critical, but differentiation is moving toward wideband real-time processing, automated signal classification, AI-assisted signal recognition, multi-platform geolocation, open mission architectures and data fusion with ground command systems. Over the next cycle, low-SWaP modular payloads and software-defined upgrades will create entry points for specialist suppliers, while the high-end strategic segment will remain constrained by export controls, platform certification and national-security procurement barriers.

This report is a detailed and comprehensive analysis for global Airborne Radio Monitoring and Direction-Finding System market. Both quantitative and qualitative analyses are presented by manufacturers, by region & country, by Type and by Application. As the market is constantly changing, this report explores the competition, supply and demand trends, as well as key factors that contribute to its changing demands across many markets. Company profiles and product examples of selected competitors, along with market share estimates of some of the selected leaders for the year 2025, are provided.

Key Features:

Global Airborne Radio Monitoring and Direction-Finding System market size and forecasts, in consumption value (\$ Million), sales quantity (Units), and average selling prices (US\$/Unit), 2021-2032

Global Airborne Radio Monitoring and Direction-Finding System market size and forecasts by region and country, in consumption value (\$ Million), sales quantity (Units), and average selling prices (US\$/Unit), 2021-2032

Global Airborne Radio Monitoring and Direction-Finding System market size and forecasts, by Type and by Application, in consumption value (\$ Million), sales quantity (Units), and average selling prices (US\$/Unit), 2021-2032

Global Airborne Radio Monitoring and Direction-Finding System market shares of main players, shipments in revenue (\$ Million), sales quantity (Units), and ASP (US\$/Unit), 2021-2026

The Primary Objectives in This Report Are:

To determine the size of the total market opportunity of global and key countries

To assess the growth potential for Airborne Radio Monitoring and Direction-Finding System

To forecast future growth in each product and end-use market

To assess competitive factors affecting the marketplace

This report profiles key players in the global Airborne Radio Monitoring and Direction-Finding System market based on the following parameters - company overview, sales quantity, revenue, price, gross margin, product portfolio, geographical presence, and key developments. Key companies covered as a part of this study include RTX Corporation, General Dynamics Corporation, BAE Systems plc, L3Harris Technologies, Inc., Thales S.A., Leonardo S.p.A., Saab AB, Israel Aerospace Industries Ltd., HENSOLDT AG, Indra Sistemas, S.A., etc.

This report also provides key insights about market drivers, restraints, opportunities, new product launches or approvals.

Market Segmentation

Airborne Radio Monitoring and Direction-Finding System market is split by Type and by Application. For the period 2021-2032, the growth among segments provides accurate calculations and forecasts for consumption value by Type, and by Application in terms of volume and value. This analysis can help you expand your business by targeting qualified niche markets.

Market segment by Type

Airborne Spectrum Monitoring System

Airborne Direction-Finding System

Airborne COMINT / C-ESM System

Other RF Monitoring Subsystems

Market segment by Platform Type

Manned Aircraft-Based System

UAV-Based System

Market segment by Frequency Coverage

HF Monitoring System

VHF / UHF Monitoring System

L / S / C Band Monitoring System

Other

Market segment by Application

Spectrum Regulation and Enforcement

Tactical SIGINT / ISR

Emergency and Event Security

Other

Major players covered

RTX Corporation

General Dynamics Corporation

BAE Systems plc

L3Harris Technologies, Inc.

Thales S.A.

Leonardo S.p.A.

Saab AB

Israel Aerospace Industries Ltd.

HENSOLDT AG

Indra Sistemas, S.A.

QinetiQ Group plc

SPX Technologies, Inc.

Rohde & Schwarz GmbH & Co. KG

Sierra Nevada Company, LLC

CRFS Ltd

LS telcom AG

Narda Safety Test Solutions GmbH

Avantix SAS

ESEN System Integration

Bharat Electronics Limited

Data Patterns (India) Ltd

LIG Nex1 Co., Ltd.

Tech Comm LLC

CommsAudit UK Ltd

Guangdong Nasas Communication Technology Co., Ltd.

Autel Robotics Co., Ltd.

Market segment by region, regional analysis covers

North America (United States, Canada, and Mexico)

Europe (Germany, France, United Kingdom, Russia, Italy, and Rest of Europe)

Asia-Pacific (China, Japan, Korea, India, Southeast Asia, and Australia)

South America (Brazil, Argentina, Colombia, and Rest of South America)

Middle East & Africa (Saudi Arabia, UAE, Egypt, South Africa, and Rest of Middle East & Africa)

The content of the study subjects, includes a total of 15 chapters:

Chapter 1, to describe Airborne Radio Monitoring and Direction-Finding System product scope, market overview, market estimation caveats and base year.

Chapter 2, to profile the top manufacturers of Airborne Radio Monitoring and Direction-Finding System, with price, sales quantity, revenue, and global market share of Airborne Radio Monitoring and Direction-Finding System from 2021 to 2026.

Chapter 3, the Airborne Radio Monitoring and Direction-Finding System competitive situation, sales quantity, revenue, and global market share of top manufacturers are analyzed emphatically by landscape contrast.

Chapter 4, the Airborne Radio Monitoring and Direction-Finding System breakdown data are shown at the regional level, to show the sales quantity, consumption value, and growth by regions, from 2021 to 2032.

Chapter 5 and 6, to segment the sales by Type and by Application, with sales market share and growth rate by Type, by Application, from 2021 to 2032.

Chapter 7, 8, 9, 10 and 11, to break the sales data at the country level, with sales quantity, consumption value, and market share for key countries in the world, from 2021 to 2026. and Airborne Radio Monitoring and Direction-Finding System market forecast, by regions, by Type, and by Application, with sales and revenue, from 2027 to 2032.

Chapter 12, market dynamics, drivers, restraints, trends, and Porters Five Forces analysis.

Chapter 13, the key raw materials and key suppliers, and industry chain of Airborne Radio Monitoring and Direction-Finding System.

Chapter 14 and 15, to describe Airborne Radio Monitoring and Direction-Finding System sales channel, distributors, customers, research findings and conclusion.

Contents

1 MARKET OVERVIEW

1.1 Product Overview and Scope

1.2 Market Estimation Caveats and Base Year

1.3 Market Analysis by Type

1.3.1 Overview: Global Airborne Radio Monitoring and Direction-Finding System
Consumption Value by Type: 2021 Versus 2025 Versus 2032

1.3.2 Airborne Spectrum Monitoring System

1.3.3 Airborne Direction-Finding System

1.3.4 Airborne COMINT / C-ESM System

1.3.5 Other RF Monitoring Subsystems

1.4 Market Analysis by Platform Type

1.4.1 Overview: Global Airborne Radio Monitoring and Direction-Finding System
Consumption Value by Platform Type: 2021 Versus 2025 Versus 2032

1.4.2 Manned Aircraft-Based System

1.4.3 UAV-Based System

1.5 Market Analysis by Frequency Coverage

1.5.1 Overview: Global Airborne Radio Monitoring and Direction-Finding System
Consumption Value by Frequency Coverage: 2021 Versus 2025 Versus 2032

1.5.2 HF Monitoring System

1.5.3 VHF / UHF Monitoring System

1.5.4 L / S / C Band Monitoring System

1.5.5 Other

1.6 Market Analysis by Application

1.6.1 Overview: Global Airborne Radio Monitoring and Direction-Finding System
Consumption Value by Application: 2021 Versus 2025 Versus 2032

1.6.2 Spectrum Regulation and Enforcement

1.6.3 Tactical SIGINT / ISR

1.6.4 Emergency and Event Security

1.6.5 Other

1.7 Global Airborne Radio Monitoring and Direction-Finding System Market Size &
Forecast

1.7.1 Global Airborne Radio Monitoring and Direction-Finding System Consumption
Value (2021 & 2025 & 2032)

1.7.2 Global Airborne Radio Monitoring and Direction-Finding System Sales Quantity
(2021-2032)

1.7.3 Global Airborne Radio Monitoring and Direction-Finding System Average Price

(2021-2032)

2 MANUFACTURERS PROFILES

2.1 RTX Corporation

2.1.1 RTX Corporation Details

2.1.2 RTX Corporation Major Business

2.1.3 RTX Corporation Airborne Radio Monitoring and Direction-Finding System

Product and Services

2.1.4 RTX Corporation Airborne Radio Monitoring and Direction-Finding System Sales Quantity, Average Price, Revenue, Gross Margin and Market Share (2021-2026)

2.1.5 RTX Corporation Recent Developments/Updates

2.2 General Dynamics Corporation

2.2.1 General Dynamics Corporation Details

2.2.2 General Dynamics Corporation Major Business

2.2.3 General Dynamics Corporation Airborne Radio Monitoring and Direction-Finding System Product and Services

2.2.4 General Dynamics Corporation Airborne Radio Monitoring and Direction-Finding System Sales Quantity, Average Price, Revenue, Gross Margin and Market Share (2021-2026)

2.2.5 General Dynamics Corporation Recent Developments/Updates

2.3 BAE Systems plc

2.3.1 BAE Systems plc Details

2.3.2 BAE Systems plc Major Business

2.3.3 BAE Systems plc Airborne Radio Monitoring and Direction-Finding System Product and Services

2.3.4 BAE Systems plc Airborne Radio Monitoring and Direction-Finding System Sales Quantity, Average Price, Revenue, Gross Margin and Market Share (2021-2026)

2.3.5 BAE Systems plc Recent Developments/Updates

2.4 L3Harris Technologies, Inc.

2.4.1 L3Harris Technologies, Inc. Details

2.4.2 L3Harris Technologies, Inc. Major Business

2.4.3 L3Harris Technologies, Inc. Airborne Radio Monitoring and Direction-Finding System Product and Services

2.4.4 L3Harris Technologies, Inc. Airborne Radio Monitoring and Direction-Finding System Sales Quantity, Average Price, Revenue, Gross Margin and Market Share (2021-2026)

2.4.5 L3Harris Technologies, Inc. Recent Developments/Updates

2.5 Thales S.A.

- 2.5.1 Thales S.A. Details
- 2.5.2 Thales S.A. Major Business
- 2.5.3 Thales S.A. Airborne Radio Monitoring and Direction-Finding System Product and Services
- 2.5.4 Thales S.A. Airborne Radio Monitoring and Direction-Finding System Sales Quantity, Average Price, Revenue, Gross Margin and Market Share (2021-2026)
- 2.5.5 Thales S.A. Recent Developments/Updates
- 2.6 Leonardo S.p.A.
 - 2.6.1 Leonardo S.p.A. Details
 - 2.6.2 Leonardo S.p.A. Major Business
 - 2.6.3 Leonardo S.p.A. Airborne Radio Monitoring and Direction-Finding System Product and Services
 - 2.6.4 Leonardo S.p.A. Airborne Radio Monitoring and Direction-Finding System Sales Quantity, Average Price, Revenue, Gross Margin and Market Share (2021-2026)
 - 2.6.5 Leonardo S.p.A. Recent Developments/Updates
- 2.7 Saab AB
 - 2.7.1 Saab AB Details
 - 2.7.2 Saab AB Major Business
 - 2.7.3 Saab AB Airborne Radio Monitoring and Direction-Finding System Product and Services
 - 2.7.4 Saab AB Airborne Radio Monitoring and Direction-Finding System Sales Quantity, Average Price, Revenue, Gross Margin and Market Share (2021-2026)
 - 2.7.5 Saab AB Recent Developments/Updates
- 2.8 Israel Aerospace Industries Ltd.
 - 2.8.1 Israel Aerospace Industries Ltd. Details
 - 2.8.2 Israel Aerospace Industries Ltd. Major Business
 - 2.8.3 Israel Aerospace Industries Ltd. Airborne Radio Monitoring and Direction-Finding System Product and Services
 - 2.8.4 Israel Aerospace Industries Ltd. Airborne Radio Monitoring and Direction-Finding System Sales Quantity, Average Price, Revenue, Gross Margin and Market Share (2021-2026)
 - 2.8.5 Israel Aerospace Industries Ltd. Recent Developments/Updates
- 2.9 HENSOLDT AG
 - 2.9.1 HENSOLDT AG Details
 - 2.9.2 HENSOLDT AG Major Business
 - 2.9.3 HENSOLDT AG Airborne Radio Monitoring and Direction-Finding System Product and Services
 - 2.9.4 HENSOLDT AG Airborne Radio Monitoring and Direction-Finding System Sales Quantity, Average Price, Revenue, Gross Margin and Market Share (2021-2026)

- 2.9.5 HENSOLDT AG Recent Developments/Updates
- 2.10 Indra Sistemas, S.A.
 - 2.10.1 Indra Sistemas, S.A. Details
 - 2.10.2 Indra Sistemas, S.A. Major Business
 - 2.10.3 Indra Sistemas, S.A. Airborne Radio Monitoring and Direction-Finding System Product and Services
 - 2.10.4 Indra Sistemas, S.A. Airborne Radio Monitoring and Direction-Finding System Sales Quantity, Average Price, Revenue, Gross Margin and Market Share (2021-2026)
 - 2.10.5 Indra Sistemas, S.A. Recent Developments/Updates
- 2.11 QinetiQ Group plc
 - 2.11.1 QinetiQ Group plc Details
 - 2.11.2 QinetiQ Group plc Major Business
 - 2.11.3 QinetiQ Group plc Airborne Radio Monitoring and Direction-Finding System Product and Services
 - 2.11.4 QinetiQ Group plc Airborne Radio Monitoring and Direction-Finding System Sales Quantity, Average Price, Revenue, Gross Margin and Market Share (2021-2026)
 - 2.11.5 QinetiQ Group plc Recent Developments/Updates
- 2.12 SPX Technologies, Inc.
 - 2.12.1 SPX Technologies, Inc. Details
 - 2.12.2 SPX Technologies, Inc. Major Business
 - 2.12.3 SPX Technologies, Inc. Airborne Radio Monitoring and Direction-Finding System Product and Services
 - 2.12.4 SPX Technologies, Inc. Airborne Radio Monitoring and Direction-Finding System Sales Quantity, Average Price, Revenue, Gross Margin and Market Share (2021-2026)
 - 2.12.5 SPX Technologies, Inc. Recent Developments/Updates
- 2.13 Rohde & Schwarz GmbH & Co. KG
 - 2.13.1 Rohde & Schwarz GmbH & Co. KG Details
 - 2.13.2 Rohde & Schwarz GmbH & Co. KG Major Business
 - 2.13.3 Rohde & Schwarz GmbH & Co. KG Airborne Radio Monitoring and Direction-Finding System Product and Services
 - 2.13.4 Rohde & Schwarz GmbH & Co. KG Airborne Radio Monitoring and Direction-Finding System Sales Quantity, Average Price, Revenue, Gross Margin and Market Share (2021-2026)
 - 2.13.5 Rohde & Schwarz GmbH & Co. KG Recent Developments/Updates
- 2.14 Sierra Nevada Company, LLC
 - 2.14.1 Sierra Nevada Company, LLC Details
 - 2.14.2 Sierra Nevada Company, LLC Major Business
 - 2.14.3 Sierra Nevada Company, LLC Airborne Radio Monitoring and Direction-Finding

System Product and Services

2.14.4 Sierra Nevada Company, LLC Airborne Radio Monitoring and Direction-Finding System Sales Quantity, Average Price, Revenue, Gross Margin and Market Share (2021-2026)

2.14.5 Sierra Nevada Company, LLC Recent Developments/Updates

2.15 CRFS Ltd

2.15.1 CRFS Ltd Details

2.15.2 CRFS Ltd Major Business

2.15.3 CRFS Ltd Airborne Radio Monitoring and Direction-Finding System Product and Services

2.15.4 CRFS Ltd Airborne Radio Monitoring and Direction-Finding System Sales Quantity, Average Price, Revenue, Gross Margin and Market Share (2021-2026)

2.15.5 CRFS Ltd Recent Developments/Updates

2.16 LS telcom AG

2.16.1 LS telcom AG Details

2.16.2 LS telcom AG Major Business

2.16.3 LS telcom AG Airborne Radio Monitoring and Direction-Finding System Product and Services

2.16.4 LS telcom AG Airborne Radio Monitoring and Direction-Finding System Sales Quantity, Average Price, Revenue, Gross Margin and Market Share (2021-2026)

2.16.5 LS telcom AG Recent Developments/Updates

2.17 Narda Safety Test Solutions GmbH

2.17.1 Narda Safety Test Solutions GmbH Details

2.17.2 Narda Safety Test Solutions GmbH Major Business

2.17.3 Narda Safety Test Solutions GmbH Airborne Radio Monitoring and Direction-Finding System Product and Services

2.17.4 Narda Safety Test Solutions GmbH Airborne Radio Monitoring and Direction-Finding System Sales Quantity, Average Price, Revenue, Gross Margin and Market Share (2021-2026)

2.17.5 Narda Safety Test Solutions GmbH Recent Developments/Updates

2.18 Avantix SAS

2.18.1 Avantix SAS Details

2.18.2 Avantix SAS Major Business

2.18.3 Avantix SAS Airborne Radio Monitoring and Direction-Finding System Product and Services

2.18.4 Avantix SAS Airborne Radio Monitoring and Direction-Finding System Sales Quantity, Average Price, Revenue, Gross Margin and Market Share (2021-2026)

2.18.5 Avantix SAS Recent Developments/Updates

2.19 ESEN System Integration

- 2.19.1 ESEN System Integration Details
- 2.19.2 ESEN System Integration Major Business
- 2.19.3 ESEN System Integration Airborne Radio Monitoring and Direction-Finding System Product and Services
- 2.19.4 ESEN System Integration Airborne Radio Monitoring and Direction-Finding System Sales Quantity, Average Price, Revenue, Gross Margin and Market Share (2021-2026)
- 2.19.5 ESEN System Integration Recent Developments/Updates
- 2.20 Bharat Electronics Limited
 - 2.20.1 Bharat Electronics Limited Details
 - 2.20.2 Bharat Electronics Limited Major Business
 - 2.20.3 Bharat Electronics Limited Airborne Radio Monitoring and Direction-Finding System Product and Services
 - 2.20.4 Bharat Electronics Limited Airborne Radio Monitoring and Direction-Finding System Sales Quantity, Average Price, Revenue, Gross Margin and Market Share (2021-2026)
 - 2.20.5 Bharat Electronics Limited Recent Developments/Updates
- 2.21 Data Patterns (India) Ltd
 - 2.21.1 Data Patterns (India) Ltd Details
 - 2.21.2 Data Patterns (India) Ltd Major Business
 - 2.21.3 Data Patterns (India) Ltd Airborne Radio Monitoring and Direction-Finding System Product and Services
 - 2.21.4 Data Patterns (India) Ltd Airborne Radio Monitoring and Direction-Finding System Sales Quantity, Average Price, Revenue, Gross Margin and Market Share (2021-2026)
 - 2.21.5 Data Patterns (India) Ltd Recent Developments/Updates
- 2.22 LIG Nex1 Co., Ltd.
 - 2.22.1 LIG Nex1 Co., Ltd. Details
 - 2.22.2 LIG Nex1 Co., Ltd. Major Business
 - 2.22.3 LIG Nex1 Co., Ltd. Airborne Radio Monitoring and Direction-Finding System Product and Services
 - 2.22.4 LIG Nex1 Co., Ltd. Airborne Radio Monitoring and Direction-Finding System Sales Quantity, Average Price, Revenue, Gross Margin and Market Share (2021-2026)
 - 2.22.5 LIG Nex1 Co., Ltd. Recent Developments/Updates
- 2.23 Tech Comm LLC
 - 2.23.1 Tech Comm LLC Details
 - 2.23.2 Tech Comm LLC Major Business
 - 2.23.3 Tech Comm LLC Airborne Radio Monitoring and Direction-Finding System Product and Services

2.23.4 Tech Comm LLC Airborne Radio Monitoring and Direction-Finding System Sales Quantity, Average Price, Revenue, Gross Margin and Market Share (2021-2026)

2.23.5 Tech Comm LLC Recent Developments/Updates

2.24 CommsAudit UK Ltd

2.24.1 CommsAudit UK Ltd Details

2.24.2 CommsAudit UK Ltd Major Business

2.24.3 CommsAudit UK Ltd Airborne Radio Monitoring and Direction-Finding System Product and Services

2.24.4 CommsAudit UK Ltd Airborne Radio Monitoring and Direction-Finding System Sales Quantity, Average Price, Revenue, Gross Margin and Market Share (2021-2026)

2.24.5 CommsAudit UK Ltd Recent Developments/Updates

2.25 Guangdong Nasas Communication Technology Co., Ltd.

2.25.1 Guangdong Nasas Communication Technology Co., Ltd. Details

2.25.2 Guangdong Nasas Communication Technology Co., Ltd. Major Business

2.25.3 Guangdong Nasas Communication Technology Co., Ltd. Airborne Radio Monitoring and Direction-Finding System Product and Services

2.25.4 Guangdong Nasas Communication Technology Co., Ltd. Airborne Radio Monitoring and Direction-Finding System Sales Quantity, Average Price, Revenue, Gross Margin and Market Share (2021-2026)

2.25.5 Guangdong Nasas Communication Technology Co., Ltd. Recent Developments/Updates

2.26 Autel Robotics Co., Ltd.

2.26.1 Autel Robotics Co., Ltd. Details

2.26.2 Autel Robotics Co., Ltd. Major Business

2.26.3 Autel Robotics Co., Ltd. Airborne Radio Monitoring and Direction-Finding System Product and Services

2.26.4 Autel Robotics Co., Ltd. Airborne Radio Monitoring and Direction-Finding System Sales Quantity, Average Price, Revenue, Gross Margin and Market Share (2021-2026)

2.26.5 Autel Robotics Co., Ltd. Recent Developments/Updates

3 COMPETITIVE ENVIRONMENT: AIRBORNE RADIO MONITORING AND DIRECTION-FINDING SYSTEM BY MANUFACTURER

3.1 Global Airborne Radio Monitoring and Direction-Finding System Sales Quantity by Manufacturer (2021-2026)

3.2 Global Airborne Radio Monitoring and Direction-Finding System Revenue by Manufacturer (2021-2026)

3.3 Global Airborne Radio Monitoring and Direction-Finding System Average Price by

Manufacturer (2021-2026)

3.4 Market Share Analysis (2025)

3.4.1 Producer Shipments of Airborne Radio Monitoring and Direction-Finding System by Manufacturer Revenue (\$MM) and Market Share (%): 2025

3.4.2 Top 3 Airborne Radio Monitoring and Direction-Finding System Manufacturer Market Share in 2025

3.4.3 Top 6 Airborne Radio Monitoring and Direction-Finding System Manufacturer Market Share in 2025

3.5 Airborne Radio Monitoring and Direction-Finding System Market: Overall Company Footprint Analysis

3.5.1 Airborne Radio Monitoring and Direction-Finding System Market: Region Footprint

3.5.2 Airborne Radio Monitoring and Direction-Finding System Market: Company Product Type Footprint

3.5.3 Airborne Radio Monitoring and Direction-Finding System Market: Company Product Application Footprint

3.6 New Market Entrants and Barriers to Market Entry

3.7 Mergers, Acquisition, Agreements, and Collaborations

4 CONSUMPTION ANALYSIS BY REGION

4.1 Global Airborne Radio Monitoring and Direction-Finding System Market Size by Region

4.1.1 Global Airborne Radio Monitoring and Direction-Finding System Sales Quantity by Region (2021-2032)

4.1.2 Global Airborne Radio Monitoring and Direction-Finding System Consumption Value by Region (2021-2032)

4.1.3 Global Airborne Radio Monitoring and Direction-Finding System Average Price by Region (2021-2032)

4.2 North America Airborne Radio Monitoring and Direction-Finding System Consumption Value (2021-2032)

4.3 Europe Airborne Radio Monitoring and Direction-Finding System Consumption Value (2021-2032)

4.4 Asia-Pacific Airborne Radio Monitoring and Direction-Finding System Consumption Value (2021-2032)

4.5 South America Airborne Radio Monitoring and Direction-Finding System Consumption Value (2021-2032)

4.6 Middle East & Africa Airborne Radio Monitoring and Direction-Finding System Consumption Value (2021-2032)

5 MARKET SEGMENT BY TYPE

5.1 Global Airborne Radio Monitoring and Direction-Finding System Sales Quantity by Type (2021-2032)

5.2 Global Airborne Radio Monitoring and Direction-Finding System Consumption Value by Type (2021-2032)

5.3 Global Airborne Radio Monitoring and Direction-Finding System Average Price by Type (2021-2032)

6 MARKET SEGMENT BY APPLICATION

6.1 Global Airborne Radio Monitoring and Direction-Finding System Sales Quantity by Application (2021-2032)

6.2 Global Airborne Radio Monitoring and Direction-Finding System Consumption Value by Application (2021-2032)

6.3 Global Airborne Radio Monitoring and Direction-Finding System Average Price by Application (2021-2032)

7 NORTH AMERICA

7.1 North America Airborne Radio Monitoring and Direction-Finding System Sales Quantity by Type (2021-2032)

7.2 North America Airborne Radio Monitoring and Direction-Finding System Sales Quantity by Application (2021-2032)

7.3 North America Airborne Radio Monitoring and Direction-Finding System Market Size by Country

7.3.1 North America Airborne Radio Monitoring and Direction-Finding System Sales Quantity by Country (2021-2032)

7.3.2 North America Airborne Radio Monitoring and Direction-Finding System Consumption Value by Country (2021-2032)

7.3.3 United States Market Size and Forecast (2021-2032)

7.3.4 Canada Market Size and Forecast (2021-2032)

7.3.5 Mexico Market Size and Forecast (2021-2032)

8 EUROPE

8.1 Europe Airborne Radio Monitoring and Direction-Finding System Sales Quantity by Type (2021-2032)

8.2 Europe Airborne Radio Monitoring and Direction-Finding System Sales Quantity by Application (2021-2032)

8.3 Europe Airborne Radio Monitoring and Direction-Finding System Market Size by Country

8.3.1 Europe Airborne Radio Monitoring and Direction-Finding System Sales Quantity by Country (2021-2032)

8.3.2 Europe Airborne Radio Monitoring and Direction-Finding System Consumption Value by Country (2021-2032)

8.3.3 Germany Market Size and Forecast (2021-2032)

8.3.4 France Market Size and Forecast (2021-2032)

8.3.5 United Kingdom Market Size and Forecast (2021-2032)

8.3.6 Russia Market Size and Forecast (2021-2032)

8.3.7 Italy Market Size and Forecast (2021-2032)

9 ASIA-PACIFIC

9.1 Asia-Pacific Airborne Radio Monitoring and Direction-Finding System Sales Quantity by Type (2021-2032)

9.2 Asia-Pacific Airborne Radio Monitoring and Direction-Finding System Sales Quantity by Application (2021-2032)

9.3 Asia-Pacific Airborne Radio Monitoring and Direction-Finding System Market Size by Region

9.3.1 Asia-Pacific Airborne Radio Monitoring and Direction-Finding System Sales Quantity by Region (2021-2032)

9.3.2 Asia-Pacific Airborne Radio Monitoring and Direction-Finding System Consumption Value by Region (2021-2032)

9.3.3 China Market Size and Forecast (2021-2032)

9.3.4 Japan Market Size and Forecast (2021-2032)

9.3.5 South Korea Market Size and Forecast (2021-2032)

9.3.6 India Market Size and Forecast (2021-2032)

9.3.7 Southeast Asia Market Size and Forecast (2021-2032)

9.3.8 Australia Market Size and Forecast (2021-2032)

10 SOUTH AMERICA

10.1 South America Airborne Radio Monitoring and Direction-Finding System Sales Quantity by Type (2021-2032)

10.2 South America Airborne Radio Monitoring and Direction-Finding System Sales Quantity by Application (2021-2032)

10.3 South America Airborne Radio Monitoring and Direction-Finding System Market Size by Country

10.3.1 South America Airborne Radio Monitoring and Direction-Finding System Sales Quantity by Country (2021-2032)

10.3.2 South America Airborne Radio Monitoring and Direction-Finding System Consumption Value by Country (2021-2032)

10.3.3 Brazil Market Size and Forecast (2021-2032)

10.3.4 Argentina Market Size and Forecast (2021-2032)

11 MIDDLE EAST & AFRICA

11.1 Middle East & Africa Airborne Radio Monitoring and Direction-Finding System Sales Quantity by Type (2021-2032)

11.2 Middle East & Africa Airborne Radio Monitoring and Direction-Finding System Sales Quantity by Application (2021-2032)

11.3 Middle East & Africa Airborne Radio Monitoring and Direction-Finding System Market Size by Country

11.3.1 Middle East & Africa Airborne Radio Monitoring and Direction-Finding System Sales Quantity by Country (2021-2032)

11.3.2 Middle East & Africa Airborne Radio Monitoring and Direction-Finding System Consumption Value by Country (2021-2032)

11.3.3 Turkey Market Size and Forecast (2021-2032)

11.3.4 Egypt Market Size and Forecast (2021-2032)

11.3.5 Saudi Arabia Market Size and Forecast (2021-2032)

11.3.6 South Africa Market Size and Forecast (2021-2032)

12 MARKET DYNAMICS

12.1 Airborne Radio Monitoring and Direction-Finding System Market Drivers

12.2 Airborne Radio Monitoring and Direction-Finding System Market Restraints

12.3 Airborne Radio Monitoring and Direction-Finding System Trends Analysis

12.4 Porters Five Forces Analysis

12.4.1 Threat of New Entrants

12.4.2 Bargaining Power of Suppliers

12.4.3 Bargaining Power of Buyers

12.4.4 Threat of Substitutes

12.4.5 Competitive Rivalry

13 RAW MATERIAL AND INDUSTRY CHAIN

13.1 Raw Material of Airborne Radio Monitoring and Direction-Finding System and Key Manufacturers

13.2 Manufacturing Costs Percentage of Airborne Radio Monitoring and Direction-Finding System

13.3 Airborne Radio Monitoring and Direction-Finding System Production Process

13.4 Industry Value Chain Analysis

14 SHIPMENTS BY DISTRIBUTION CHANNEL

14.1 Sales Channel

14.1.1 Direct to End-User

14.1.2 Distributors

14.2 Airborne Radio Monitoring and Direction-Finding System Typical Distributors

14.3 Airborne Radio Monitoring and Direction-Finding System Typical Customers

15 RESEARCH FINDINGS AND CONCLUSION

16 APPENDIX

16.1 Methodology

16.2 Research Process and Data Source

16.3 Disclaimer

List Of Tables

LIST OF TABLES

- Table 1. Global Airborne Radio Monitoring and Direction-Finding System Consumption Value by Type, (USD Million), 2021 & 2025 & 2032
- Table 2. Global Airborne Radio Monitoring and Direction-Finding System Consumption Value by Platform Type, (USD Million), 2021 & 2025 & 2032
- Table 3. Global Airborne Radio Monitoring and Direction-Finding System Consumption Value by Frequency Coverage, (USD Million), 2021 & 2025 & 2032
- Table 4. Global Airborne Radio Monitoring and Direction-Finding System Consumption Value by Application, (USD Million), 2021 & 2025 & 2032
- Table 5. RTX Corporation Basic Information, Manufacturing Base and Competitors
- Table 6. RTX Corporation Major Business
- Table 7. RTX Corporation Airborne Radio Monitoring and Direction-Finding System Product and Services
- Table 8. RTX Corporation Airborne Radio Monitoring and Direction-Finding System Sales Quantity (Units), Average Price (US\$/Unit), Revenue (USD Million), Gross Margin and Market Share (2021-2026)
- Table 9. RTX Corporation Recent Developments/Updates
- Table 10. General Dynamics Corporation Basic Information, Manufacturing Base and Competitors
- Table 11. General Dynamics Corporation Major Business
- Table 12. General Dynamics Corporation Airborne Radio Monitoring and Direction-Finding System Product and Services
- Table 13. General Dynamics Corporation Airborne Radio Monitoring and Direction-Finding System Sales Quantity (Units), Average Price (US\$/Unit), Revenue (USD Million), Gross Margin and Market Share (2021-2026)
- Table 14. General Dynamics Corporation Recent Developments/Updates
- Table 15. BAE Systems plc Basic Information, Manufacturing Base and Competitors
- Table 16. BAE Systems plc Major Business
- Table 17. BAE Systems plc Airborne Radio Monitoring and Direction-Finding System Product and Services
- Table 18. BAE Systems plc Airborne Radio Monitoring and Direction-Finding System Sales Quantity (Units), Average Price (US\$/Unit), Revenue (USD Million), Gross Margin and Market Share (2021-2026)
- Table 19. BAE Systems plc Recent Developments/Updates
- Table 20. L3Harris Technologies, Inc. Basic Information, Manufacturing Base and Competitors

- Table 21. L3Harris Technologies, Inc. Major Business
- Table 22. L3Harris Technologies, Inc. Airborne Radio Monitoring and Direction-Finding System Product and Services
- Table 23. L3Harris Technologies, Inc. Airborne Radio Monitoring and Direction-Finding System Sales Quantity (Units), Average Price (US\$/Unit), Revenue (USD Million), Gross Margin and Market Share (2021-2026)
- Table 24. L3Harris Technologies, Inc. Recent Developments/Updates
- Table 25. Thales S.A. Basic Information, Manufacturing Base and Competitors
- Table 26. Thales S.A. Major Business
- Table 27. Thales S.A. Airborne Radio Monitoring and Direction-Finding System Product and Services
- Table 28. Thales S.A. Airborne Radio Monitoring and Direction-Finding System Sales Quantity (Units), Average Price (US\$/Unit), Revenue (USD Million), Gross Margin and Market Share (2021-2026)
- Table 29. Thales S.A. Recent Developments/Updates
- Table 30. Leonardo S.p.A. Basic Information, Manufacturing Base and Competitors
- Table 31. Leonardo S.p.A. Major Business
- Table 32. Leonardo S.p.A. Airborne Radio Monitoring and Direction-Finding System Product and Services
- Table 33. Leonardo S.p.A. Airborne Radio Monitoring and Direction-Finding System Sales Quantity (Units), Average Price (US\$/Unit), Revenue (USD Million), Gross Margin and Market Share (2021-2026)
- Table 34. Leonardo S.p.A. Recent Developments/Updates
- Table 35. Saab AB Basic Information, Manufacturing Base and Competitors
- Table 36. Saab AB Major Business
- Table 37. Saab AB Airborne Radio Monitoring and Direction-Finding System Product and Services
- Table 38. Saab AB Airborne Radio Monitoring and Direction-Finding System Sales Quantity (Units), Average Price (US\$/Unit), Revenue (USD Million), Gross Margin and Market Share (2021-2026)
- Table 39. Saab AB Recent Developments/Updates
- Table 40. Israel Aerospace Industries Ltd. Basic Information, Manufacturing Base and Competitors
- Table 41. Israel Aerospace Industries Ltd. Major Business
- Table 42. Israel Aerospace Industries Ltd. Airborne Radio Monitoring and Direction-Finding System Product and Services
- Table 43. Israel Aerospace Industries Ltd. Airborne Radio Monitoring and Direction-Finding System Sales Quantity (Units), Average Price (US\$/Unit), Revenue (USD Million), Gross Margin and Market Share (2021-2026)

- Table 44. Israel Aerospace Industries Ltd. Recent Developments/Updates
- Table 45. HENSOLDT AG Basic Information, Manufacturing Base and Competitors
- Table 46. HENSOLDT AG Major Business
- Table 47. HENSOLDT AG Airborne Radio Monitoring and Direction-Finding System Product and Services
- Table 48. HENSOLDT AG Airborne Radio Monitoring and Direction-Finding System Sales Quantity (Units), Average Price (US\$/Unit), Revenue (USD Million), Gross Margin and Market Share (2021-2026)
- Table 49. HENSOLDT AG Recent Developments/Updates
- Table 50. Indra Sistemas, S.A. Basic Information, Manufacturing Base and Competitors
- Table 51. Indra Sistemas, S.A. Major Business
- Table 52. Indra Sistemas, S.A. Airborne Radio Monitoring and Direction-Finding System Product and Services
- Table 53. Indra Sistemas, S.A. Airborne Radio Monitoring and Direction-Finding System Sales Quantity (Units), Average Price (US\$/Unit), Revenue (USD Million), Gross Margin and Market Share (2021-2026)
- Table 54. Indra Sistemas, S.A. Recent Developments/Updates
- Table 55. QinetiQ Group plc Basic Information, Manufacturing Base and Competitors
- Table 56. QinetiQ Group plc Major Business
- Table 57. QinetiQ Group plc Airborne Radio Monitoring and Direction-Finding System Product and Services
- Table 58. QinetiQ Group plc Airborne Radio Monitoring and Direction-Finding System Sales Quantity (Units), Average Price (US\$/Unit), Revenue (USD Million), Gross Margin and Market Share (2021-2026)
- Table 59. QinetiQ Group plc Recent Developments/Updates
- Table 60. SPX Technologies, Inc. Basic Information, Manufacturing Base and Competitors
- Table 61. SPX Technologies, Inc. Major Business
- Table 62. SPX Technologies, Inc. Airborne Radio Monitoring and Direction-Finding System Product and Services
- Table 63. SPX Technologies, Inc. Airborne Radio Monitoring and Direction-Finding System Sales Quantity (Units), Average Price (US\$/Unit), Revenue (USD Million), Gross Margin and Market Share (2021-2026)
- Table 64. SPX Technologies, Inc. Recent Developments/Updates
- Table 65. Rohde & Schwarz GmbH & Co. KG Basic Information, Manufacturing Base and Competitors
- Table 66. Rohde & Schwarz GmbH & Co. KG Major Business
- Table 67. Rohde & Schwarz GmbH & Co. KG Airborne Radio Monitoring and Direction-Finding System Product and Services

Table 68. Rohde & Schwarz GmbH & Co. KG Airborne Radio Monitoring and Direction-Finding System Sales Quantity (Units), Average Price (US\$/Unit), Revenue (USD Million), Gross Margin and Market Share (2021-2026)

Table 69. Rohde & Schwarz GmbH & Co. KG Recent Developments/Updates

Table 70. Sierra Nevada Company, LLC Basic Information, Manufacturing Base and Competitors

Table 71. Sierra Nevada Company, LLC Major Business

Table 72. Sierra Nevada Company, LLC Airborne Radio Monitoring and Direction-Finding System Product and Services

Table 73. Sierra Nevada Company, LLC Airborne Radio Monitoring and Direction-Finding System Sales Quantity (Units), Average Price (US\$/Unit), Revenue (USD Million), Gross Margin and Market Share (2021-2026)

Table 74. Sierra Nevada Company, LLC Recent Developments/Updates

Table 75. CRFS Ltd Basic Information, Manufacturing Base and Competitors

Table 76. CRFS Ltd Major Business

Table 77. CRFS Ltd Airborne Radio Monitoring and Direction-Finding System Product and Services

Table 78. CRFS Ltd Airborne Radio Monitoring and Direction-Finding System Sales Quantity (Units), Average Price (US\$/Unit), Revenue (USD Million), Gross Margin and Market Share (2021-2026)

Table 79. CRFS Ltd Recent Developments/Updates

Table 80. LS telcom AG Basic Information, Manufacturing Base and Competitors

Table 81. LS telcom AG Major Business

Table 82. LS telcom AG Airborne Radio Monitoring and Direction-Finding System Product and Services

Table 83. LS telcom AG Airborne Radio Monitoring and Direction-Finding System Sales Quantity (Units), Average Price (US\$/Unit), Revenue (USD Million), Gross Margin and Market Share (2021-2026)

Table 84. LS telcom AG Recent Developments/Updates

Table 85. Narda Safety Test Solutions GmbH Basic Information, Manufacturing Base and Competitors

Table 86. Narda Safety Test Solutions GmbH Major Business

Table 87. Narda Safety Test Solutions GmbH Airborne Radio Monitoring and Direction-Finding System Product and Services

Table 88. Narda Safety Test Solutions GmbH Airborne Radio Monitoring and Direction-Finding System Sales Quantity (Units), Average Price (US\$/Unit), Revenue (USD Million), Gross Margin and Market Share (2021-2026)

Table 89. Narda Safety Test Solutions GmbH Recent Developments/Updates

Table 90. Avantix SAS Basic Information, Manufacturing Base and Competitors

Table 91. Avantix SAS Major Business

Table 92. Avantix SAS Airborne Radio Monitoring and Direction-Finding System Product and Services

Table 93. Avantix SAS Airborne Radio Monitoring and Direction-Finding System Sales Quantity (Units), Average Price (US\$/Unit), Revenue (USD Million), Gross Margin and Market Share (2021-2026)

Table 94. Avantix SAS Recent Developments/Updates

Table 95. ESEN System Integration Basic Information, Manufacturing Base and Competitors

Table 96. ESEN System Integration Major Business

Table 97. ESEN System Integration Airborne Radio Monitoring and Direction-Finding System Product and Services

Table 98. ESEN System Integration Airborne Radio Monitoring and Direction-Finding System Sales Quantity (Units), Average Price (US\$/Unit), Revenue (USD Million), Gross Margin and Market Share (2021-2026)

Table 99. ESEN System Integration Recent Developments/Updates

Table 100. Bharat Electronics Limited Basic Information, Manufacturing Base and Competitors

Table 101. Bharat Electronics Limited Major Business

Table 102. Bharat Electronics Limited Airborne Radio Monitoring and Direction-Finding System Product and Services

Table 103. Bharat Electronics Limited Airborne Radio Monitoring and Direction-Finding System Sales Quantity (Units), Average Price (US\$/Unit), Revenue (USD Million), Gross Margin and Market Share (2021-2026)

Table 104. Bharat Electronics Limited Recent Developments/Updates

Table 105. Data Patterns (India) Ltd Basic Information, Manufacturing Base and Competitors

Table 106. Data Patterns (India) Ltd Major Business

Table 107. Data Patterns (India) Ltd Airborne Radio Monitoring and Direction-Finding System Product and Services

Table 108. Data Patterns (India) Ltd Airborne Radio Monitoring and Direction-Finding System Sales Quantity (Units), Average Price (US\$/Unit), Revenue (USD Million), Gross Margin and Market Share (2021-2026)

Table 109. Data Patterns (India) Ltd Recent Developments/Updates

Table 110. LIG Nex1 Co., Ltd. Basic Information, Manufacturing Base and Competitors

Table 111. LIG Nex1 Co., Ltd. Major Business

Table 112. LIG Nex1 Co., Ltd. Airborne Radio Monitoring and Direction-Finding System Product and Services

Table 113. LIG Nex1 Co., Ltd. Airborne Radio Monitoring and Direction-Finding System

Sales Quantity (Units), Average Price (US\$/Unit), Revenue (USD Million), Gross Margin and Market Share (2021-2026)

Table 114. LIG Nex1 Co., Ltd. Recent Developments/Updates

Table 115. Tech Comm LLC Basic Information, Manufacturing Base and Competitors

Table 116. Tech Comm LLC Major Business

Table 117. Tech Comm LLC Airborne Radio Monitoring and Direction-Finding System Product and Services

Table 118. Tech Comm LLC Airborne Radio Monitoring and Direction-Finding System Sales Quantity (Units), Average Price (US\$/Unit), Revenue (USD Million), Gross Margin and Market Share (2021-2026)

Table 119. Tech Comm LLC Recent Developments/Updates

Table 120. CommsAudit UK Ltd Basic Information, Manufacturing Base and Competitors

Table 121. CommsAudit UK Ltd Major Business

Table 122. CommsAudit UK Ltd Airborne Radio Monitoring and Direction-Finding System Product and Services

Table 123. CommsAudit UK Ltd Airborne Radio Monitoring and Direction-Finding System Sales Quantity (Units), Average Price (US\$/Unit), Revenue (USD Million), Gross Margin and Market Share (2021-2026)

Table 124. CommsAudit UK Ltd Recent Developments/Updates

Table 125. Guangdong Nasas Communication Technology Co., Ltd. Basic Information, Manufacturing Base and Competitors

Table 126. Guangdong Nasas Communication Technology Co., Ltd. Major Business

Table 127. Guangdong Nasas Communication Technology Co., Ltd. Airborne Radio Monitoring and Direction-Finding System Product and Services

Table 128. Guangdong Nasas Communication Technology Co., Ltd. Airborne Radio Monitoring and Direction-Finding System Sales Quantity (Units), Average Price (US\$/Unit), Revenue (USD Million), Gross Margin and Market Share (2021-2026)

Table 129. Guangdong Nasas Communication Technology Co., Ltd. Recent Developments/Updates

Table 130. Autel Robotics Co., Ltd. Basic Information, Manufacturing Base and Competitors

Table 131. Autel Robotics Co., Ltd. Major Business

Table 132. Autel Robotics Co., Ltd. Airborne Radio Monitoring and Direction-Finding System Product and Services

Table 133. Autel Robotics Co., Ltd. Airborne Radio Monitoring and Direction-Finding System Sales Quantity (Units), Average Price (US\$/Unit), Revenue (USD Million), Gross Margin and Market Share (2021-2026)

Table 134. Autel Robotics Co., Ltd. Recent Developments/Updates

- Table 135. Global Airborne Radio Monitoring and Direction-Finding System Sales Quantity by Manufacturer (2021-2026) & (Units)
- Table 136. Global Airborne Radio Monitoring and Direction-Finding System Revenue by Manufacturer (2021-2026) & (USD Million)
- Table 137. Global Airborne Radio Monitoring and Direction-Finding System Average Price by Manufacturer (2021-2026) & (US\$/Unit)
- Table 138. Market Position of Manufacturers in Airborne Radio Monitoring and Direction-Finding System, (Tier 1, Tier 2, and Tier 3), Based on Revenue in 2025
- Table 139. Head Office and Airborne Radio Monitoring and Direction-Finding System Production Site of Key Manufacturer
- Table 140. Airborne Radio Monitoring and Direction-Finding System Market: Company Product Type Footprint
- Table 141. Airborne Radio Monitoring and Direction-Finding System Market: Company Product Application Footprint
- Table 142. Airborne Radio Monitoring and Direction-Finding System New Market Entrants and Barriers to Market Entry
- Table 143. Airborne Radio Monitoring and Direction-Finding System Mergers, Acquisition, Agreements, and Collaborations
- Table 144. Global Airborne Radio Monitoring and Direction-Finding System Consumption Value by Region (2021-2025-2032) & (USD Million) & CAGR
- Table 145. Global Airborne Radio Monitoring and Direction-Finding System Sales Quantity by Region (2021-2026) & (Units)
- Table 146. Global Airborne Radio Monitoring and Direction-Finding System Sales Quantity by Region (2027-2032) & (Units)
- Table 147. Global Airborne Radio Monitoring and Direction-Finding System Consumption Value by Region (2021-2026) & (USD Million)
- Table 148. Global Airborne Radio Monitoring and Direction-Finding System Consumption Value by Region (2027-2032) & (USD Million)
- Table 149. Global Airborne Radio Monitoring and Direction-Finding System Average Price by Region (2021-2026) & (US\$/Unit)
- Table 150. Global Airborne Radio Monitoring and Direction-Finding System Average Price by Region (2027-2032) & (US\$/Unit)
- Table 151. Global Airborne Radio Monitoring and Direction-Finding System Sales Quantity by Type (2021-2026) & (Units)
- Table 152. Global Airborne Radio Monitoring and Direction-Finding System Sales Quantity by Type (2027-2032) & (Units)
- Table 153. Global Airborne Radio Monitoring and Direction-Finding System Consumption Value by Type (2021-2026) & (USD Million)
- Table 154. Global Airborne Radio Monitoring and Direction-Finding System

Consumption Value by Type (2027-2032) & (USD Million)

Table 155. Global Airborne Radio Monitoring and Direction-Finding System Average Price by Type (2021-2026) & (US\$/Unit)

Table 156. Global Airborne Radio Monitoring and Direction-Finding System Average Price by Type (2027-2032) & (US\$/Unit)

Table 157. Global Airborne Radio Monitoring and Direction-Finding System Sales Quantity by Application (2021-2026) & (Units)

Table 158. Global Airborne Radio Monitoring and Direction-Finding System Sales Quantity by Application (2027-2032) & (Units)

Table 159. Global Airborne Radio Monitoring and Direction-Finding System Consumption Value by Application (2021-2026) & (USD Million)

Table 160. Global Airborne Radio Monitoring and Direction-Finding System Consumption Value by Application (2027-2032) & (USD Million)

Table 161. Global Airborne Radio Monitoring and Direction-Finding System Average Price by Application (2021-2026) & (US\$/Unit)

Table 162. Global Airborne Radio Monitoring and Direction-Finding System Average Price by Application (2027-2032) & (US\$/Unit)

Table 163. North America Airborne Radio Monitoring and Direction-Finding System Sales Quantity by Type (2021-2026) & (Units)

Table 164. North America Airborne Radio Monitoring and Direction-Finding System Sales Quantity by Type (2027-2032) & (Units)

Table 165. North America Airborne Radio Monitoring and Direction-Finding System Sales Quantity by Application (2021-2026) & (Units)

Table 166. North America Airborne Radio Monitoring and Direction-Finding System Sales Quantity by Application (2027-2032) & (Units)

Table 167. North America Airborne Radio Monitoring and Direction-Finding System Sales Quantity by Country (2021-2026) & (Units)

Table 168. North America Airborne Radio Monitoring and Direction-Finding System Sales Quantity by Country (2027-2032) & (Units)

Table 169. North America Airborne Radio Monitoring and Direction-Finding System Consumption Value by Country (2021-2026) & (USD Million)

Table 170. North America Airborne Radio Monitoring and Direction-Finding System Consumption Value by Country (2027-2032) & (USD Million)

Table 171. Europe Airborne Radio Monitoring and Direction-Finding System Sales Quantity by Type (2021-2026) & (Units)

Table 172. Europe Airborne Radio Monitoring and Direction-Finding System Sales Quantity by Type (2027-2032) & (Units)

Table 173. Europe Airborne Radio Monitoring and Direction-Finding System Sales Quantity by Application (2021-2026) & (Units)

Table 174. Europe Airborne Radio Monitoring and Direction-Finding System Sales Quantity by Application (2027-2032) & (Units)

Table 175. Europe Airborne Radio Monitoring and Direction-Finding System Sales Quantity by Country (2021-2026) & (Units)

Table 176. Europe Airborne Radio Monitoring and Direction-Finding System Sales Quantity by Country (2027-2032) & (Units)

Table 177. Europe Airborne Radio Monitoring and Direction-Finding System Consumption Value by Country (2021-2026) & (USD Million)

Table 178. Europe Airborne Radio Monitoring and Direction-Finding System Consumption Value by Country (2027-2032) & (USD Million)

Table 179. Asia-Pacific Airborne Radio Monitoring and Direction-Finding System Sales Quantity by Type (2021-2026) & (Units)

Table 180. Asia-Pacific Airborne Radio Monitoring and Direction-Finding System Sales Quantity by Type (2027-2032) & (Units)

Table 181. Asia-Pacific Airborne Radio Monitoring and Direction-Finding System Sales Quantity by Application (2021-2026) & (Units)

Table 182. Asia-Pacific Airborne Radio Monitoring and Direction-Finding System Sales Quantity by Application (2027-2032) & (Units)

Table 183. Asia-Pacific Airborne Radio Monitoring and Direction-Finding System Sales Quantity by Region (2021-2026) & (Units)

Table 184. Asia-Pacific Airborne Radio Monitoring and Direction-Finding System Sales Quantity by Region (2027-2032) & (Units)

Table 185. Asia-Pacific Airborne Radio Monitoring and Direction-Finding System Consumption Value by Region (2021-2026) & (USD Million)

Table 186. Asia-Pacific Airborne Radio Monitoring and Direction-Finding System Consumption Value by Region (2027-2032) & (USD Million)

Table 187. South America Airborne Radio Monitoring and Direction-Finding System Sales Quantity by Type (2021-2026) & (Units)

Table 188. South America Airborne Radio Monitoring and Direction-Finding System Sales Quantity by Type (2027-2032) & (Units)

Table 189. South America Airborne Radio Monitoring and Direction-Finding System Sales Quantity by Application (2021-2026) & (Units)

Table 190. South America Airborne Radio Monitoring and Direction-Finding System Sales Quantity by Application (2027-2032) & (Units)

Table 191. South America Airborne Radio Monitoring and Direction-Finding System Sales Quantity by Country (2021-2026) & (Units)

Table 192. South America Airborne Radio Monitoring and Direction-Finding System Sales Quantity by Country (2027-2032) & (Units)

Table 193. South America Airborne Radio Monitoring and Direction-Finding System

Consumption Value by Country (2021-2026) & (USD Million)

Table 194. South America Airborne Radio Monitoring and Direction-Finding System

Consumption Value by Country (2027-2032) & (USD Million)

Table 195. Middle East & Africa Airborne Radio Monitoring and Direction-Finding

System Sales Quantity by Type (2021-2026) & (Units)

Table 196. Middle East & Africa Airborne Radio Monitoring and Direction-Finding

System Sales Quantity by Type (2027-2032) & (Units)

Table 197. Middle East & Africa Airborne Radio Monitoring and Direction-Finding

System Sales Quantity by Application (2021-2026) & (Units)

Table 198. Middle East & Africa Airborne Radio Monitoring and Direction-Finding

System Sales Quantity by Application (2027-2032) & (Units)

Table 199. Middle East & Africa Airborne Radio Monitoring and Direction-Finding

System Sales Quantity by Country (2021-2026) & (Units)

Table 200. Middle East & Africa Airborne Radio Monitoring and Direction-Finding

System Sales Quantity by Country (2027-2032) & (Units)

Table 201. Middle East & Africa Airborne Radio Monitoring and Direction-Finding

System Consumption Value by Country (2021-2026) & (USD Million)

Table 202. Middle East & Africa Airborne Radio Monitoring and Direction-Finding

System Consumption Value by Country (2027-2032) & (USD Million)

Table 203. Airborne Radio Monitoring and Direction-Finding System Raw Material

Table 204. Key Manufacturers of Airborne Radio Monitoring and Direction-Finding

System Raw Materials

Table 205. Airborne Radio Monitoring and Direction-Finding System Typical Distributors

Table 206. Airborne Radio Monitoring and Direction-Finding System Typical Customers

List Of Figures

LIST OF FIGURES

- Figure 1. Airborne Radio Monitoring and Direction-Finding System Picture
- Figure 2. Global Airborne Radio Monitoring and Direction-Finding System Revenue by Type, (USD Million), 2021 & 2025 & 2032
- Figure 3. Global Airborne Radio Monitoring and Direction-Finding System Revenue Market Share by Type in 2025
- Figure 4. Airborne Spectrum Monitoring System Examples
- Figure 5. Airborne Direction-Finding System Examples
- Figure 6. Airborne COMINT / C-ESM System Examples
- Figure 7. Other RF Monitoring Subsystems Examples
- Figure 8. Global Airborne Radio Monitoring and Direction-Finding System Revenue by Platform Type, (USD Million), 2021 & 2025 & 2032
- Figure 9. Global Airborne Radio Monitoring and Direction-Finding System Revenue Market Share by Platform Type in 2025
- Figure 10. Manned Aircraft-Based System Examples
- Figure 11. UAV-Based System Examples
- Figure 12. Global Airborne Radio Monitoring and Direction-Finding System Revenue by Frequency Coverage, (USD Million), 2021 & 2025 & 2032
- Figure 13. Global Airborne Radio Monitoring and Direction-Finding System Revenue Market Share by Frequency Coverage in 2025
- Figure 14. HF Monitoring System Examples
- Figure 15. VHF / UHF Monitoring System Examples
- Figure 16. L / S / C Band Monitoring System Examples
- Figure 17. Other Examples
- Figure 18. Global Airborne Radio Monitoring and Direction-Finding System Consumption Value by Application, (USD Million), 2021 & 2025 & 2032
- Figure 19. Global Airborne Radio Monitoring and Direction-Finding System Revenue Market Share by Application in 2025
- Figure 20. Spectrum Regulation and Enforcement Examples
- Figure 21. Tactical SIGINT / ISR Examples
- Figure 22. Emergency and Event Security Examples
- Figure 23. Other Examples
- Figure 24. Global Airborne Radio Monitoring and Direction-Finding System Consumption Value, (USD Million): 2021 & 2025 & 2032
- Figure 25. Global Airborne Radio Monitoring and Direction-Finding System Consumption Value and Forecast (2021-2032) & (USD Million)

Figure 26. Global Airborne Radio Monitoring and Direction-Finding System Sales Quantity (2021-2032) & (Units)

Figure 27. Global Airborne Radio Monitoring and Direction-Finding System Price (2021-2032) & (US\$/Unit)

Figure 28. Global Airborne Radio Monitoring and Direction-Finding System Sales Quantity Market Share by Manufacturer in 2025

Figure 29. Global Airborne Radio Monitoring and Direction-Finding System Revenue Market Share by Manufacturer in 2025

Figure 30. Producer Shipments of Airborne Radio Monitoring and Direction-Finding System by Manufacturer Sales (\$MM) and Market Share (%): 2025

Figure 31. Top 3 Airborne Radio Monitoring and Direction-Finding System Manufacturer (Revenue) Market Share in 2025

Figure 32. Top 6 Airborne Radio Monitoring and Direction-Finding System Manufacturer (Revenue) Market Share in 2025

Figure 33. Global Airborne Radio Monitoring and Direction-Finding System Sales Quantity Market Share by Region (2021-2032)

Figure 34. Global Airborne Radio Monitoring and Direction-Finding System Consumption Value Market Share by Region (2021-2032)

Figure 35. North America Airborne Radio Monitoring and Direction-Finding System Consumption Value (2021-2032) & (USD Million)

Figure 36. Europe Airborne Radio Monitoring and Direction-Finding System Consumption Value (2021-2032) & (USD Million)

Figure 37. Asia-Pacific Airborne Radio Monitoring and Direction-Finding System Consumption Value (2021-2032) & (USD Million)

Figure 38. South America Airborne Radio Monitoring and Direction-Finding System Consumption Value (2021-2032) & (USD Million)

Figure 39. Middle East & Africa Airborne Radio Monitoring and Direction-Finding System Consumption Value (2021-2032) & (USD Million)

Figure 40. Global Airborne Radio Monitoring and Direction-Finding System Sales Quantity Market Share by Type (2021-2032)

Figure 41. Global Airborne Radio Monitoring and Direction-Finding System Consumption Value Market Share by Type (2021-2032)

Figure 42. Global Airborne Radio Monitoring and Direction-Finding System Average Price by Type (2021-2032) & (US\$/Unit)

Figure 43. Global Airborne Radio Monitoring and Direction-Finding System Sales Quantity Market Share by Application (2021-2032)

Figure 44. Global Airborne Radio Monitoring and Direction-Finding System Revenue Market Share by Application (2021-2032)

Figure 45. Global Airborne Radio Monitoring and Direction-Finding System Average

Price by Application (2021-2032) & (US\$/Unit)

Figure 46. North America Airborne Radio Monitoring and Direction-Finding System Sales Quantity Market Share by Type (2021-2032)

Figure 47. North America Airborne Radio Monitoring and Direction-Finding System Sales Quantity Market Share by Application (2021-2032)

Figure 48. North America Airborne Radio Monitoring and Direction-Finding System Sales Quantity Market Share by Country (2021-2032)

Figure 49. North America Airborne Radio Monitoring and Direction-Finding System Consumption Value Market Share by Country (2021-2032)

Figure 50. United States Airborne Radio Monitoring and Direction-Finding System Consumption Value (2021-2032) & (USD Million)

Figure 51. Canada Airborne Radio Monitoring and Direction-Finding System Consumption Value (2021-2032) & (USD Million)

Figure 52. Mexico Airborne Radio Monitoring and Direction-Finding System Consumption Value (2021-2032) & (USD Million)

Figure 53. Europe Airborne Radio Monitoring and Direction-Finding System Sales Quantity Market Share by Type (2021-2032)

Figure 54. Europe Airborne Radio Monitoring and Direction-Finding System Sales Quantity Market Share by Application (2021-2032)

Figure 55. Europe Airborne Radio Monitoring and Direction-Finding System Sales Quantity Market Share by Country (2021-2032)

Figure 56. Europe Airborne Radio Monitoring and Direction-Finding System Consumption Value Market Share by Country (2021-2032)

Figure 57. Germany Airborne Radio Monitoring and Direction-Finding System Consumption Value (2021-2032) & (USD Million)

Figure 58. France Airborne Radio Monitoring and Direction-Finding System Consumption Value (2021-2032) & (USD Million)

Figure 59. United Kingdom Airborne Radio Monitoring and Direction-Finding System Consumption Value (2021-2032) & (USD Million)

Figure 60. Russia Airborne Radio Monitoring and Direction-Finding System Consumption Value (2021-2032) & (USD Million)

Figure 61. Italy Airborne Radio Monitoring and Direction-Finding System Consumption Value (2021-2032) & (USD Million)

Figure 62. Asia-Pacific Airborne Radio Monitoring and Direction-Finding System Sales Quantity Market Share by Type (2021-2032)

Figure 63. Asia-Pacific Airborne Radio Monitoring and Direction-Finding System Sales Quantity Market Share by Application (2021-2032)

Figure 64. Asia-Pacific Airborne Radio Monitoring and Direction-Finding System Sales Quantity Market Share by Region (2021-2032)

Figure 65. Asia-Pacific Airborne Radio Monitoring and Direction-Finding System Consumption Value Market Share by Region (2021-2032)

Figure 66. China Airborne Radio Monitoring and Direction-Finding System Consumption Value (2021-2032) & (USD Million)

Figure 67. Japan Airborne Radio Monitoring and Direction-Finding System Consumption Value (2021-2032) & (USD Million)

Figure 68. South Korea Airborne Radio Monitoring and Direction-Finding System Consumption Value (2021-2032) & (USD Million)

Figure 69. India Airborne Radio Monitoring and Direction-Finding System Consumption Value (2021-2032) & (USD Million)

Figure 70. Southeast Asia Airborne Radio Monitoring and Direction-Finding System Consumption Value (2021-2032) & (USD Million)

Figure 71. Australia Airborne Radio Monitoring and Direction-Finding System Consumption Value (2021-2032) & (USD Million)

Figure 72. South America Airborne Radio Monitoring and Direction-Finding System Sales Quantity Market Share by Type (2021-2032)

Figure 73. South America Airborne Radio Monitoring and Direction-Finding System Sales Quantity Market Share by Application (2021-2032)

Figure 74. South America Airborne Radio Monitoring and Direction-Finding System Sales Quantity Market Share by Country (2021-2032)

Figure 75. South America Airborne Radio Monitoring and Direction-Finding System Consumption Value Market Share by Country (2021-2032)

Figure 76. Brazil Airborne Radio Monitoring and Direction-Finding System Consumption Value (2021-2032) & (USD Million)

Figure 77. Argentina Airborne Radio Monitoring and Direction-Finding System Consumption Value (2021-2032) & (USD Million)

Figure 78. Middle East & Africa Airborne Radio Monitoring and Direction-Finding System Sales Quantity Market Share by Type (2021-2032)

Figure 79. Middle East & Africa Airborne Radio Monitoring and Direction-Finding System Sales Quantity Market Share by Application (2021-2032)

Figure 80. Middle East & Africa Airborne Radio Monitoring and Direction-Finding System Sales Quantity Market Share by Country (2021-2032)

Figure 81. Middle East & Africa Airborne Radio Monitoring and Direction-Finding System Consumption Value Market Share by Country (2021-2032)

Figure 82. Turkey Airborne Radio Monitoring and Direction-Finding System Consumption Value (2021-2032) & (USD Million)

Figure 83. Egypt Airborne Radio Monitoring and Direction-Finding System Consumption Value (2021-2032) & (USD Million)

Figure 84. Saudi Arabia Airborne Radio Monitoring and Direction-Finding System

Consumption Value (2021-2032) & (USD Million)

Figure 85. South Africa Airborne Radio Monitoring and Direction-Finding System

Consumption Value (2021-2032) & (USD Million)

Figure 86. Airborne Radio Monitoring and Direction-Finding System Market Drivers

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