

Global Low-altitude Integrated Sensing and Communication (ISAC) Surveillance 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 Low-altitude Integrated Sensing and Communication (ISAC) Surveillance System market size was valued at US\$ 1136 million in 2025 and is forecast to a readjusted size of US\$ 5912 million by 2032 with a CAGR of 25.9% during review period.

In 2025, global shipments of Low-altitude Integrated Sensing and Communication Surveillance Systems reached approximately 1,840 sets, with an average system price of about K US\$ 600 per set. A Low-altitude Integrated Sensing and Communication Surveillance System is a system-level surveillance product designed for drones, eVTOL aircraft, general aviation aircraft and low-slow-small aerial targets. It typically consists of integrated sensing and communication equipment, low-altitude surveillance radar, radio identification devices, electro-optical and infrared sensors, multi-source fusion platforms, edge computing units and alerting and command software. By combining communication-sensing integration, radar detection, spectrum identification, Remote ID, ADS-B, electro-optical confirmation and multi-source data fusion, the system enables low-altitude target detection, identification, positioning, velocity measurement, trajectory tracking, abnormal flight alerting and airspace situational awareness. It is mainly used in urban public low-altitude governance, aviation operation protection, civil critical site protection, defense and border security, industrial low-altitude operation support, and emergency and temporary public safety scenarios.

Low-altitude Integrated Sensing and Communication Surveillance Systems are evolving from conventional counter-drone security equipment into a critical sensing layer of low-

altitude economy infrastructure. As drone logistics, urban inspection, emergency response, eVTOL pilot operations and low-altitude route management continue to develop, the key challenge for regulators and operators is no longer simply whether aircraft can fly, but whether low-altitude targets can be detected, identified, continuously tracked and safely managed. Therefore, the value of this system lies not only in detecting unauthorized drones, but also in providing real-time situational awareness for urban low-altitude governance, airport operation protection, critical site security and industrial low-altitude operations.

From a market perspective, the global market size of Low-altitude Integrated Sensing and Communication Surveillance Systems is estimated at approximately US\$1,103.8 million in 2025 and is expected to reach US\$1,444.3 million in 2026, with a projected CAGR of around 26.5% from 2026 to 2032. Growth is mainly driven by three layers of demand. The first is non-cooperative target detection, including low-slow-small drones, unauthorized flights and sensitive-area intrusion monitoring. The second is cooperative target surveillance, including Remote ID, ADS-B, BVLOS operation support and low-altitude route monitoring. The third is the accelerated deployment of 5G-A integrated sensing and communication, low-altitude radar and multi-source fusion platforms in city-level low-altitude infrastructure projects. Overall, the market is still transitioning from pilot projects to scaled deployment, with near-term demand mainly coming from governments, airports, defense and law enforcement agencies, energy companies and critical infrastructure operators.

The competitive landscape will not be dominated by a single type of player. Instead, it will involve communication equipment vendors, radar manufacturers, radio-frequency sensing providers, electro-optical and infrared system suppliers, multi-source fusion platform companies and low-altitude security control system providers. Huawei, ZTE and Ericsson represent the network sensing route; Echodyne, Robin Radar, Terma, Weibel, Naruida, Glarun Technology and Sun Create represent the low-altitude radar route; Aaronia, Rohde & Schwarz, D-Fend Solutions, Shanghai Terjin and Lizheng Technology represent the radio sensing and identification route; while IAI, Thales, Teledyne FLIR, Hikvision, GEOVIS and LES Information are more representative of multi-source fusion and system-level solutions. In the long run, companies with stronger competitiveness will not be those offering only a single sensor, but those capable of integrating radar, RF sensing, electro-optical systems, Remote ID, ADS-B and low-altitude airspace data into a practical and actionable situational awareness system.

It should also be noted that the market still faces several uncertainties, including inconsistent statistical boundaries, a high share of project-based revenue, immature

standards, and different regulatory timelines across countries. Some companies claim exposure to the low-altitude economy, but their actual business may only involve general security cameras, ordinary communication networks, standalone jamming devices or system integration services. These should not be directly counted as core suppliers of Low-altitude Integrated Sensing and Communication Surveillance Systems. For market sizing and company screening, a medium-narrow scope is more appropriate, focusing on system-level products with low-altitude target detection, identification, positioning, tracking, alerting and situational awareness capabilities. Overall, this is a policy-driven and infrastructure-oriented market with strong purchasing interest, but it remains in an early expansion stage. The next three to five years will be a key window for the market to move from demonstration projects toward regional-scale deployment.

This report is a detailed and comprehensive analysis for global Low-altitude Integrated Sensing and Communication (ISAC) Surveillance 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 Low-altitude Integrated Sensing and Communication (ISAC) Surveillance System market size and forecasts, in consumption value (\$ Million), sales quantity (Sets), and average selling prices (K US\$/Set), 2021-2032

Global Low-altitude Integrated Sensing and Communication (ISAC) Surveillance System market size and forecasts by region and country, in consumption value (\$ Million), sales quantity (Sets), and average selling prices (K US\$/Set), 2021-2032

Global Low-altitude Integrated Sensing and Communication (ISAC) Surveillance System market size and forecasts, by Type and by Application, in consumption value (\$ Million), sales quantity (Sets), and average selling prices (K US\$/Set), 2021-2032

Global Low-altitude Integrated Sensing and Communication (ISAC) Surveillance System market shares of main players, shipments in revenue (\$ Million), sales quantity (Sets), and ASP (K US\$/Set), 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 Low-altitude Integrated Sensing and Communication (ISAC) Surveillance 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 Low-altitude Integrated Sensing and Communication (ISAC) Surveillance 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 Huawei Technologies Co., Ltd., ZTE Corporation, Ericsson AB, CICT Mobile Communication Technology Co., Ltd., Echodyne Corp., Fortem Technologies, Inc., MatrixSpace, Inc., DeTect, Inc., SRC, Inc., Spotter Global, Inc., etc.

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

Market Segmentation

Low-altitude Integrated Sensing and Communication (ISAC) Surveillance 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

Network Sensing Type

Radar Surveillance Type

Radio Sensing Type

Electro Optical Type

Fusion Awareness Type

Other

Market segment by Deployment Type

Fixed Deployment Type

Mobile Vehicle Type

Portable Deployment Type

Platform Service Type

Market segment by Target Attribute

Cooperative Target Surveillance

Non Cooperative Target Surveillance

Mixed Target Surveillance

Market segment by Application

Urban Public Low Altitude Governance

Aviation Operation Protection

Civil Critical Site Protection

Defense and Border Security

Industrial Low Altitude Operation Support

Emergency and Temporary Public Safety

Other

Major players covered

Huawei Technologies Co., Ltd.

ZTE Corporation

Ericsson AB

CICT Mobile Communication Technology Co., Ltd.

Echodyne Corp.

Fortem Technologies, Inc.

MatrixSpace, Inc.

DeTect, Inc.

SRC, Inc.

Spotter Global, Inc.

Robin Radar Systems B.V.

Blighter Surveillance Systems Ltd.

Terma A/S

Weibel Scientific A/S

Advanced Protection Systems S.A.

Meteksan Defence Industry Inc.

Thales S.A.

HENSOLDT AG

Saab AB

Leonardo S.p.A.

Indra Sistemas, S.A.

Israel Aerospace Industries Ltd.

Toshiba Corporation

Mitsubishi Electric Corporation

Hanwha Systems Co., Ltd.

LIG Nex1 Co., Ltd.

Bharat Electronics Limited

Tron Future Tech Inc.

Guangdong Naruida Technology Co., Ltd.

Anhui Sun Create Electronics Co., Ltd.

Glarun Technology Co., Ltd.

Aerospace Nanhu Electronic Information Technology Co., Ltd.

Novasky Technology Co., Ltd.

Nanjing Tianlang Defense Technology Co., Ltd.

Sichuan Jiuzhou Electric Co., Ltd.

Guangzhou Haige Communications Group Incorporated Company

Hidden Level, Inc.

Rohde & Schwarz GmbH & Co. KG

uAvionix Corporation

Aaronia AG

CRFS Limited

Sentrycs Ltd.

D-Fend Solutions AD Ltd.

DroneShield Ltd.

MyDefence A/S

Shanghai Terjin Radio Technology Co., Ltd.

Beijing Lizheng Technology Co., Ltd.

Beijing Telesound Electronics Co., Ltd.

Teledyne FLIR Defense

Hangzhou Hikvision Digital Technology Co., Ltd.

Rafael Advanced Defense Systems Ltd.

Electro Optic Systems Holdings Limited

QinetiQ Group plc

ST Engineering Ltd.

Zen Technologies Limited

Greene Robotics Pvt. Ltd.

Nanjing LES Information Technology Co., Ltd.

GEOVIS Technology 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 Low-altitude Integrated Sensing and Communication (ISAC) Surveillance System product scope, market overview, market estimation caveats and base year.

Chapter 2, to profile the top manufacturers of Low-altitude Integrated Sensing and Communication (ISAC) Surveillance System, with price, sales quantity, revenue, and global market share of Low-altitude Integrated Sensing and Communication (ISAC) Surveillance System from 2021 to 2026.

Chapter 3, the Low-altitude Integrated Sensing and Communication (ISAC) Surveillance System competitive situation, sales quantity, revenue, and global market share of top manufacturers are analyzed emphatically by landscape contrast.

Chapter 4, the Low-altitude Integrated Sensing and Communication (ISAC) Surveillance 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 Low-altitude Integrated Sensing and Communication (ISAC) Surveillance 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 Low-altitude Integrated Sensing and Communication (ISAC) Surveillance System.

Chapter 14 and 15, to describe Low-altitude Integrated Sensing and Communication (ISAC) Surveillance System sales channel, distributors, customers, research findings and conclusion.

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