

Global Radar Scene Emulator and Radar Target Simulator Supply, Demand and Key Producers, 2026-2032

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Abstracts

The global Radar Scene Emulator and Radar Target Simulator market size is expected to reach \$ 844 million by 2032, rising at a market growth of 10.2% CAGR during the forecast period (2026-2032).

Radar Scene Emulators and Radar Target Simulators are specialised test and validation systems designed to generate controlled, repeatable and calibrated radar echoes or radar scenes for radar sensors, radar modules, radar systems and radar perception algorithms. They typically combine RF receive-and-retransmit architectures, digital IF processing, fibre-optic or electronic delay, Doppler shifting, radar cross-section control, angular emulation, antenna-array front ends and real-time scenario-control software. The core purpose is to reproduce target range, relative velocity, RCS, angle of arrival, target trajectory and multi-object radar scenes in a laboratory, anechoic chamber, hardware-in-the-loop, vehicle-in-the-loop, production-line or defence test environment. The product scope mainly covers single-target simulators, multi-target automotive millimetre-wave radar target simulators, radar echo generators, radar scene emulator screens, electronically steered antenna-array simulators, radar environment simulators and target-generation subsystems embedded in radar production test benches. Mainstream automotive applications are concentrated around 24 GHz, 60 GHz and 76-81 GHz radar bands, while aerospace and defence applications may cover a much broader RF spectrum.

Indicative pricing ranges from several thousand to tens of thousands of US dollars for compact Doppler or handheld target simulators, from roughly one hundred thousand to several hundred thousand US dollars for production-oriented automotive radar test systems, and from several hundred thousand to several million US dollars for high-end

multi-target RTS and full-scene RSE systems.

Based on our research, the Radar Scene Emulator and Radar Target Simulator market should not be treated as a generic electronic test instrument segment. It is a specialised equipment market sitting at the intersection of radar sensing, millimetre-wave RF engineering, real-time signal processing, target modelling, hardware-in-the-loop validation and production test automation. As automotive radar evolves from basic adaptive cruise control and blind-spot detection towards 4D imaging, multi-radar fusion, short-range high-resolution sensing and complex urban perception, conventional road testing, static corner reflectors and single-target setups are no longer sufficient. The commercial value of RSE and RTS systems lies in transforming rare, dangerous, costly or hard-to-repeat real-world radar scenarios into controlled laboratory and production environments.

From a supply-side perspective, the global competitive structure is layered. Keysight and Rohde & Schwarz are among the most visible high-end suppliers in automotive radar scene and target emulation. dSPACE, NI, Konrad Technologies and NOFFZ occupy strong positions where radar target simulation is embedded into HIL, production test, automation and vehicle engineering workflows. Mercury Systems, Kratos, Intersoft Electronics, Safran, Eastern OptX and ARESIA serve defence, aerospace and radar-system-level validation use cases. Japanese suppliers such as KEYCOM and Microwave Factory, together with German and US specialty vendors such as perisens, ERAVANT and QuinStar, demonstrate that there remains a meaningful base of specialised regional and niche suppliers. In mainland China, Beijing LCRT and Racobit already show credible local product evidence, but their financial disclosure, global service network and international reference visibility remain more limited than those of established Western suppliers.

Demand is most visibly driven by automotive radar validation. European general vehicle safety rules and US AEB requirements are raising the importance of robust and repeatable testing for forward collision warning, automatic emergency braking, pedestrian detection and broader ADAS functions. At the same time, higher radar content per vehicle, migration toward 76-81 GHz, 4D imaging radar, corner radar and short-range radar architectures are expanding the need for laboratory-based radar target simulation, production-line calibration and system-level HIL or ViL validation. Defence and aerospace applications are smaller in unit volume but typically carry higher system prices and higher customisation intensity, making them an important contributor to value rather than volume.

From a technology-route perspective, the industry is moving from single-target, fixed-distance or mechanically assisted simulation toward multi-target, close-range, high-bandwidth, wide-FOV, electronically steered, real-time and scene-level radar emulation. Keysight's RSE represents a multi-pixel full-scene emulation route. Rohde & Schwarz's AREG800A and QAT100 architecture represents a radar echo generator combined with an electronically steerable antenna-array front end. dSPACE and NI-linked ecosystems place stronger emphasis on integration with HIL, vehicle simulation, automation and production workflows. Over the next cycle, competition will be defined not only by RF specifications, but also by scene fidelity, calibration repeatability, software openness, production throughput, close-range emulation capability and the ability to fit into customer validation processes.

The outlook remains constructive, although the market should be assessed with disciplined scope control. If generic signal generators, anechoic chambers, ADAS HIL platforms, radar testing services and radar sensors themselves are included, the apparent market size becomes much larger but less analytically useful. Under the narrower equipment scope adopted in this report, RSE/RTS remains a several-hundred-million-dollar global market with high technical intensity and strong growth potential. Future growth will be led by advanced ADAS validation, 4D imaging radar production, Tier 1 radar manufacturing, regulatory pressure for functional safety, and defence radar modernisation. Large suppliers are likely to reinforce their position through platform-based systems and software ecosystems, while smaller companies will continue to compete through lower-cost products, specific frequency coverage, portability, customisation and local service responsiveness.

This report studies the global Radar Scene Emulator and Radar Target Simulator production, demand, key manufacturers, and key regions.

This report is a detailed and comprehensive analysis of the world market for Radar Scene Emulator and Radar Target Simulator and provides market size (US\$ million) and Year-over-Year (YoY) Growth, considering 2025 as the base year. This report explores demand trends and competition, as well as details the characteristics of Radar Scene Emulator and Radar Target Simulator that contribute to its increasing demand across many markets.

Highlights and key features of the study

Global Radar Scene Emulator and Radar Target Simulator total production and demand, 2021-2032, (Units)

Global Radar Scene Emulator and Radar Target Simulator total production value,

2021-2032, (USD Million)

Global Radar Scene Emulator and Radar Target Simulator production by region & country, production, value, CAGR, 2021-2032, (USD Million) & (Units), (based on production site)

Global Radar Scene Emulator and Radar Target Simulator consumption by region & country, CAGR, 2021-2032 & (Units)

U.S. VS China: Radar Scene Emulator and Radar Target Simulator domestic production, consumption, key domestic manufacturers and share

Global Radar Scene Emulator and Radar Target Simulator production by manufacturer, production, price, value and market share 2021-2026, (USD Million) & (Units)

Global Radar Scene Emulator and Radar Target Simulator production by Product Function, production, value, CAGR, 2021-2032, (USD Million) & (Units)

Global Radar Scene Emulator and Radar Target Simulator production by Application, production, value, CAGR, 2021-2032, (USD Million) & (Units)

This report profiles key players in the global Radar Scene Emulator and Radar Target Simulator market based on the following parameters - company overview, production, value, price, gross margin, product portfolio, geographical presence, and key developments. Key companies covered as a part of this study include Rohde & Schwarz, Keysight Technologies, dSPACE, NI, Mercury Systems, Konrad Technologies, NOFFZ Technologies, Kratos RT Logic, Intersoft Electronics, Safran Group, etc.

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

Stakeholders would have ease in decision-making through various strategy matrices used in analyzing the World Radar Scene Emulator and Radar Target Simulator market

Detailed Segmentation:

Each section contains quantitative market data including market by value (US\$ Millions), volume (production, consumption) & (Units) and average price (K US\$/Unit) by manufacturer, by Product Function, and by Application. Data is given for the years 2021-2032 by year with 2025 as the base year, 2026 as the estimate year, and 2027-2032 as the forecast year.

Global Radar Scene Emulator and Radar Target Simulator Market, By Region:

United States

China

Europe

Japan

South Korea

ASEAN

India

Rest of World

Global Radar Scene Emulator and Radar Target Simulator Market, Segmentation by Product Function:

Single-target Radar Target Simulator

Multi-target Radar Target Simulator

Radar Scene Emulator

Radar Environment / Target Generator

Global Radar Scene Emulator and Radar Target Simulator Market, Segmentation by Technology Architecture:

RF Receive-and-Retransmit Architecture

Digital IF / FPGA-based Simulation

RF-over-Fiber / Delay-line Simulation

Electronic Antenna Array / Scene Screen

Other

Global Radar Scene Emulator and Radar Target Simulator Market, Segmentation by Radar Frequency Band:

24 GHz Radar Simulation

60 GHz Radar Simulation

76-81 GHz Automotive Radar Simulation

Other

Global Radar Scene Emulator and Radar Target Simulator Market, Segmentation by Application:

Automotive ADAS / Autonomous Driving

Radar Sensor Production Test

Aerospace and Defense Radar Testing

Industrial, Rail and Security Radar Testing

Other

Companies Profiled:

Rohde & Schwarz

Keysight Technologies

dSPACE

NI

Mercury Systems

Konrad Technologies

NOFFZ Technologies

Kratos RT Logic

Intersoft Electronics

Safran Group

KEYCOM Corporation

Beijing LCRT

Tianjin Racobit

Microwave Factory

perisens

ERAVANT

Eastern OptX

QuinStar Technology

smartmicro

Ultrontek

RFbeam Microwave

ARESIA

Mi-Wave

AMG Microwave

Key Questions Answered:

1. How big is the global Radar Scene Emulator and Radar Target Simulator market?
2. What is the demand of the global Radar Scene Emulator and Radar Target Simulator market?
3. What is the year over year growth of the global Radar Scene Emulator and Radar Target Simulator market?
4. What is the production and production value of the global Radar Scene Emulator and Radar Target Simulator market?
5. Who are the key producers in the global Radar Scene Emulator and Radar Target Simulator market?
6. What are the growth factors driving the market demand?

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Figure 72. Radar Scene Emulator and Radar Target Simulator Sales Model

Figure 73. Radar Scene Emulator and Radar Target Simulator Sales Channels, Direct Sales, and Distribution

Figure 74. Methodology

Figure 75. Research Process and Data Source

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