

Global S-band Primary Surveillance Radar Supply, Demand and Key Producers, 2026-2032

<https://marketpublishers.com/r/G1D1E349DDE1EN.html>

Date: July 2026

Pages: 100

Price: US\$ 4,480.00 (Single User License)

ID: G1D1E349DDE1EN

Abstracts

The global S-band Primary Surveillance Radar market size is expected to reach \$ 326 million by 2032, rising at a market growth of 2.4% CAGR during the forecast period (2026-2032).

S-band Primary Surveillance Radar (PSR) is a non-cooperative primary radar system utilized for air traffic control. Typically operating within the S-band frequency range of approximately 2.7-2.9 GHz, it acquires information such as target azimuth, range, and trajectory by transmitting electromagnetic waves into the airspace and receiving echoes reflected back by aircraft or other targets; notably, it does not rely on responses from onboard transponders. Its core value lies in its ability to detect targets that have failed to activate their transponders, targets with malfunctioning transponders, or non-cooperative targets. It is primarily deployed for surveillance within airport terminal areas, for approach control, within certain extended terminal areas, and in airspace shared by both military and civil aviation.

The upstream supply chain primarily comprises RF power devices, transmit-receive modules, antenna arrays, rotary servo mechanisms, low-noise receiving chains, frequency sources, signal processing boards, and control and monitoring systems. Among these components, solid-state transmitters, GaN power modules, digital receivers, and clutter suppression algorithms are the key factors that determine the system's detection performance, reliability, and maintenance costs. The downstream market consists mainly of civil aviation authorities, airports, and air force bases; when making procurement decisions, these entities prioritize factors such as detection range, the capability to detect low-altitude targets, and resistance to both clutter and interference from wind farms.

In 2025, the global market for new S-band Primary Surveillance Radar units is projected to see sales of approximately 60 units. The average unit price is estimated to range between \$4 million and \$5 million, while leading manufacturers are expected to maintain gross profit margins ranging from 35% to 50%.

This report studies the global S-band Primary Surveillance Radar production, demand, key manufacturers, and key regions.

This report is a detailed and comprehensive analysis of the world market for S-band Primary Surveillance Radar 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 S-band Primary Surveillance Radar that contribute to its increasing demand across many markets.

Highlights and key features of the study

Global S-band Primary Surveillance Radar total production and demand, 2021-2032, (Units)

Global S-band Primary Surveillance Radar total production value, 2021-2032, (USD Million)

Global S-band Primary Surveillance Radar production by region & country, production, value, CAGR, 2021-2032, (USD Million) & (Units), (based on production site)

Global S-band Primary Surveillance Radar consumption by region & country, CAGR, 2021-2032 & (Units)

U.S. VS China: S-band Primary Surveillance Radar domestic production, consumption, key domestic manufacturers and share

Global S-band Primary Surveillance Radar production by manufacturer, production, price, value and market share 2021-2026, (USD Million) & (Units)

Global S-band Primary Surveillance Radar production by Type, production, value, CAGR, 2021-2032, (USD Million) & (Units)

Global S-band Primary Surveillance Radar production by Application, production, value, CAGR, 2021-2032, (USD Million) & (Units)

This report profiles key players in the global S-band Primary Surveillance Radar 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 Indra, Leonardo, Thales, RTX, L3Harris, Eldis Pardubice, Easat Radar Systems, Sun Create, Glarun Technology, 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 S-band Primary Surveillance Radar 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 Type, 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 S-band Primary Surveillance Radar Market, By Region:

United States

China

Europe

Japan

South Korea

ASEAN

India

Rest of World

Global S-band Primary Surveillance Radar Market, Segmentation by Type:

All-Solid-State

GaN Solid-State

Global S-band Primary Surveillance Radar Market, Segmentation by Detection Range:

? 60 Nautical Miles

? 80 Nautical Miles

? 100 Nautical Miles

Global S-band Primary Surveillance Radar Market, Segmentation by Application:

Civilian Use

Military Use

Companies Profiled:

Indra

Leonardo

Thales

RTX

L3Harris

Eldis Pardubice

Easat Radar Systems

Sun Create

Glarun Technology

Key Questions Answered:

1. How big is the global S-band Primary Surveillance Radar market?

2. What is the demand of the global S-band Primary Surveillance Radar market?
3. What is the year over year growth of the global S-band Primary Surveillance Radar market?
4. What is the production and production value of the global S-band Primary Surveillance Radar market?
5. Who are the key producers in the global S-band Primary Surveillance Radar market?
6. What are the growth factors driving the market demand?

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