

Global Targeting Pods (TGP) Supply, Demand and Key Producers, 2026-2032

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Abstracts

The global Targeting Pods (TGP) market size is expected to reach \$ 3139 million by 2032, rising at a market growth of 4.9% CAGR during the forecast period (2026-2032).

The targeting pod (TGP) is a specific type of airborne electro-optical payload dedicated to the delivery of precision-guided weapons. While it can be seen as a functional extension of the electro-optical pod in weapon guidance, its core mission is highly focused. It is not merely reconnaissance and sensing equipment, but an essential combat component carried by fighter jets and attack aircraft. It is used to detect, identify, automatically track, and lock onto ground or sea targets at long range, ultimately emitting coded lasers to guide laser-guided bombs, missiles, and other munitions, while simultaneously generating precise target coordinates to guide satellite-guided munitions. The targeting pod (TGP) integrates a high-resolution forward-looking infrared (FLIR) system, a high-definition CCD television camera, a dual-mode laser, a laser rangefinder, and an inertial navigation system, maintaining line-of-sight stability through a two- or three-axis high-precision servo stabilization platform.

In 2025, global Targeting Pods (TGP) sale reached approximately 4,240 Units, with an average global market price of around 508 K US\$/Unit. Production capacity reached 5,500 Units, with a gross profit margin of approximately 38%.

The upstream segment mainly consists of mid-wave/short-wave infrared detectors, high-definition visible light cameras, low-light sensors, laser ranging and illumination modules, inertial stabilization platforms, precision servos, image processing electronics, and airborne data link interfaces. These components collectively determine the pod's detection range, identification accuracy, and weapon guidance capabilities. Midstream companies include Lockheed Martin's Sniper, Northrop Grumman's LITENING system

(developed jointly with Rafael), and Thales' TALIOS. While Leonardo and HENSOLDT primarily offer airborne electro-optical/infrared, surveillance, and target designation solutions, this also reflects the European supply chain's trend towards integrating target designation, intelligence, surveillance, and reconnaissance (ISR), and platforms into a unified mission system. The downstream market is highly concentrated on existing fighter, attack, and upgraded fleet platforms for air forces and naval aviation, as well as UAVs and special mission aircraft requiring lightweight targeting/ISTAR payloads.

This report studies the global Targeting Pods (TGP) production, demand, key manufacturers, and key regions.

This report is a detailed and comprehensive analysis of the world market for Targeting Pods (TGP) 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 Targeting Pods (TGP) that contribute to its increasing demand across many markets.

Highlights and key features of the study

Global Targeting Pods (TGP) total production and demand, 2021-2032, (Units)

Global Targeting Pods (TGP) total production value, 2021-2032, (USD Million)

Global Targeting Pods (TGP) production by region & country, production, value, CAGR, 2021-2032, (USD Million) & (Units), (based on production site)

Global Targeting Pods (TGP) consumption by region & country, CAGR, 2021-2032 & (Units)

U.S. VS China: Targeting Pods (TGP) domestic production, consumption, key domestic manufacturers and share

Global Targeting Pods (TGP) production by manufacturer, production, price, value and market share 2021-2026, (USD Million) & (Units)

Global Targeting Pods (TGP) production by Type, production, value, CAGR, 2021-2032, (USD Million) & (Units)

Global Targeting Pods (TGP) production by Application, production, value, CAGR, 2021-2032, (USD Million) & (Units)

This report profiles key players in the global Targeting Pods (TGP) 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 Teledyne FLIR, Hensoldt, AVIC Jonhon Optronic Technology, Lockheed Martin, Thales, Rafael Advanced Defense Systems Ltd.,

Northrop Grumman, Elbit Systems, BAE Systems, Leonardo, 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 Targeting Pods (TGP) 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 Targeting Pods (TGP) Market, By Region:

United States

China

Europe

Japan

South Korea

ASEAN

India

Rest of World

Global Targeting Pods (TGP) Market, Segmentation by Type:

Multispectral

Hyperspectral

Global Targeting Pods (TGP) Market, Segmentation by Specifications:

Small Optoelectronic Pods

Medium Optoelectronic Pods

Large Optoelectronic Pods

Global Targeting Pods (TGP) Market, Segmentation by Stabilization Architecture:

2-axis Stabilized Gimbals

3-axis Stabilized Gimbals

4-axis Stabilized Gimbals

Global Targeting Pods (TGP) Market, Segmentation by Application:

National Defense

Air Traffic

Drone Industry

Others

Companies Profiled:

Teledyne FLIR

Hensoldt

AVIC Jonhon Optronics Technology

Lockheed Martin

Thales

Rafael Advanced Defense Systems Ltd.

Northrop Grumman

Elbit Systems

BAE Systems

Leonardo

Safran

Israel Aerospace Industries

Aselsan

Elcarim Optronic

Resonon Inc

Headwall Photonics

Wuhan JOHO Technology

Changchun Tongshi Optoelectronic Technology

Beijing StarNeto Technology

Key Questions Answered:

1. How big is the global Targeting Pods (TGP) market?
2. What is the demand of the global Targeting Pods (TGP) market?
3. What is the year over year growth of the global Targeting Pods (TGP) market?
4. What is the production and production value of the global Targeting Pods (TGP)

market?

5. Who are the key producers in the global Targeting Pods (TGP) market?

6. What are the growth factors driving the market demand?

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