

Low-Band Electronic Warfare Systems Market Opportunity, Growth Drivers, Industry Trend Analysis, and Forecast 2025 - 2034

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Abstracts

The Global Low-Band Electronic Warfare Systems Market was valued at USD 3.4 billion in 2024 and is estimated to grow at a CAGR of 5.4% to reach USD 5.7 billion by 2034, driven by the increasing defense budgets and the rising demand for advanced countermeasures to combat evolving threats, such as drones and unmanned aerial vehicles (UAVs). Military forces worldwide are prioritizing electronic warfare (EW) systems to enhance their defense capabilities, especially against emerging aerial threats. These systems are crucial in electronic shielding, signal monitoring, and neutralizing airborne threats, which play a critical role in air, naval, and ground operations.

Trade policies and tariffs have also had a significant impact on the low-band electronic warfare systems market, particularly due to rising material costs, such as steel and aluminum. This has strained the supply chain, causing financial challenges for system manufacturers. To mitigate these issues, companies are focusing on domestic production to reduce dependency on international supply chains, ensuring stability and cost-effectiveness in an uncertain geopolitical environment. Furthermore, the ongoing modernization of military defense systems continues to drive the adoption of EW systems, further strengthening the demand for countermeasure technologies in both military and defense operations.

The low-band electronic warfare systems market is segmented by platform, including airborne, naval, ground, and space applications. Among these, the airborne segment holds the largest market share and is expected to grow at a CAGR of 4.7% by 2034. Airborne platforms such as fighter jets, surveillance aircraft, and unmanned aerial vehicles (UAVs) are increasingly integrated with electronic countermeasure (ECM)

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systems to defend against advanced threats like surface-to-air missiles (SAMs) and radar networks. These systems include radar jamming and signal spoofing technologies, essential for ensuring air superiority and suppressing enemy threats in modern warfare scenarios.

In terms of system type, the market is divided into electronic attack (EA), electronic protection (EP), and electronic support (ES). The electronic attack segment is anticipated to reach USD 2.4 billion by 2034, largely driven by the increasing demand for anti-drone technologies. These technologies, including GPS spoofing and RF jamming, are becoming increasingly important due to the proliferation of unmanned aerial systems in modern warfare. Additionally, radar denial strategies, which are critical for maintaining air superiority and supporting stealth missions, are contributing to the growth of the electronic attack sector. As adversarial forces increasingly rely on advanced drones and other aerial platforms, the need for robust electronic attack solutions will continue to rise.

United States Low-Band Electronic Warfare Systems Market generated USD 500 million in 2024, driven by the country's strong investment in cutting-edge defense infrastructure and its ongoing focus on multi-domain operations. As military strategies continue to integrate cyber and space domains into traditional warfare tactics, the demand for integrated EW systems capable of operating across these domains is increasing. The U.S. military's emphasis on joint operations further reinforces its position as a dominant player in the global low-band electronic warfare systems market.

Key players in the Global Low-Band Electronic Warfare Systems Market include companies like BAE Systems, Lockheed Martin, Northrop Grumman, L3Harris Technologies, and Raytheon Technologies. In the highly competitive low-band electronic warfare systems market, leading companies are adopting strategies like expanding product portfolios, acquiring smaller firms, and investing in advanced R&D to enhance their technological capabilities. Companies such as Raytheon Technologies and Northrop Grumman are focusing on integrating EW systems with cyber capabilities, while L3Harris Technologies is strengthening its market position through strategic partnerships and collaborations. Expanding into emerging markets and forming alliances with defense agencies is another tactic used by these companies to secure long-term growth and increase market share.

Companies Mentioned

BAE Systems plc, Cobham Ltd., Elbit Systems Ltd., HENSOLDT AG, Israel Aerospace,



Industries (IAI), L3Harris Technologies, Inc., Leonardo DRS, Leonardo S.p.A., Lockheed Martin Corporation, Mercury Systems, Inc., Raytheon Technologies Corporation, Rohde & Schwarz GmbH & Co KG, Saab AB, Thales Group



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