

# **Electronic Warfare Market Report by Product (EW Equipment, EW Operational Support), Equipment (Jammer, Countermeasure System, Decoy, Directed Energy Weapon, and Others), Capacity (Electronic Protection, Electronic Support, Electronic Attack), Platform (Land, Naval, Airborne, Space), and Region 2024-2032**

<https://marketpublishers.com/r/E8677BEBD987EN.html>

Date: March 2024

Pages: 145

Price: US\$ 3,899.00 (Single User License)

ID: E8677BEBD987EN

## **Abstracts**

The global electronic warfare market size reached US\$ 18.4 Billion in 2023. Looking forward, IMARC Group expects the market to reach US\$ 27.5 Billion by 2032, exhibiting a growth rate (CAGR) of 4.45% during 2024-2032. The market is experiencing steady growth driven by a dynamic threat landscape, technological advancements fostering innovation, and global military modernization initiatives, driving sustained growth as defense forces seek advanced systems to counter evolving electronic threats.

### **Electronic Warfare Market Analysis:**

**Market Growth and Size:** The global market is experiencing robust growth, driven by increasing defense budgets, geopolitical tensions, and the imperative for military modernization, resulting in a substantial expansion in market size.

**Major Market Drivers:** Key drivers include the evolving threat landscape, technological advancements, and global military modernization initiatives, reflecting the necessity for advanced electronic warfare capabilities to counter emerging electronic threats.

**Technological Advancements:** Ongoing technological advancements in areas such as artificial intelligence, machine learning, and directed energy weapons contribute to the development of more sophisticated and effective electronic warfare systems, enhancing their overall capabilities.

**Industry Applications:** Electronic warfare finds applications across diverse platforms,

including land, naval, airborne, and space, reflecting its versatility in safeguarding military assets and achieving superiority in the electromagnetic spectrum.

**Key Market Trends:** Current trends involve a focus on electronic protection, collaboration between nations for joint defense initiatives, and the integration of innovative technologies like directed energy weapons, highlighting the dynamic evolution of electronic warfare practices.

**Geographical Trends:** Geographical trends indicate North America as the largest market segment, driven by substantial defense budgets, while Asia Pacific emerges as a rapidly growing region, marked by increasing defense expenditures and military modernization efforts.

**Competitive Landscape:** The competitive landscape features major players actively investing in research and development, collaborations, and portfolio expansions to maintain a competitive edge in the market.

**Challenges and Opportunities:** Challenges include data security concerns, resistance to change, and the need for widespread adoption, while opportunities lie in sustainability-focused solutions, meeting evolving consumer demands, and navigating global supply chain complexities.

**Future Outlook:** The future outlook for the global market is promising, with sustained growth anticipated as industries prioritize advanced electronic warfare solutions.

Continued technological advancements, expanding applications, and a focus on sustainability position the market for continued evolution and innovation in the coming years.

#### Electronic Warfare Market Trends:

##### Evolving threat landscape

The dynamic and evolving threat landscape is a primary driver of the electronic warfare (EW) market. As geopolitical tensions persist and technological advancements proliferate, adversaries continually develop sophisticated electronic threats. This includes radar jamming, communications disruption, and electronic surveillance. To counter these evolving threats, defense forces worldwide are investing in advanced electronic warfare systems, fostering innovation and development in the market. These investments aim to enhance the capability of electronic warfare systems to detect, analyze, and neutralize emerging electronic threats effectively. As new frequencies and communication protocols emerge, the need for adaptable and agile electronic warfare solutions becomes paramount. Additionally, the integration of artificial intelligence and machine learning technologies into these systems is gaining prominence, enabling real-time threat analysis and response. The collaboration between governments, defense contractors, and technology companies further accelerates advancements in electronic

warfare, creating a robust ecosystem focused on staying ahead of adversaries. This continuous cycle of innovation underscores the critical role electronic warfare plays in maintaining national security in an ever-changing global landscape.

### Rapid technological advancements and innovations

The rapid pace of technological advancements is a significant factor propelling the electronic warfare market. Advances in signal processing, artificial intelligence, machine learning, and sensor capabilities enhance the effectiveness of electronic warfare systems. Innovative solutions, such as cognitive electronic warfare, enable real-time adaptation to emerging threats, providing a crucial advantage in electronic battlespaces. The constant drive for innovation and cutting-edge technologies sustains the market's growth as defense forces seek state-of-the-art electronic warfare capabilities.

### Rising modernization initiatives and geopolitical tensions

Global geopolitical tensions and the imperative for military modernization initiatives are key drivers stimulating the electronic warfare market. Nations worldwide are modernizing their defense capabilities to address emerging threats and enhance their strategic posture. As geopolitical rivalries intensify, there is a heightened focus on electronic warfare systems to gain a competitive edge in contested environments. This geopolitical context drives substantial investments in electronic warfare technologies, creating a robust market environment for the development and deployment of advanced electronic warfare solutions.

### Electronic Warfare Industry Segmentation:

IMARC Group provides an analysis of the key trends in each segment of the market, along with forecasts at the global, regional, and country levels for 2024-2032. Our report has categorized the market based on product, equipment, capacity, and platform.

### Breakup by Product:

EW Equipment

EW Operational Support

The report has provided a detailed breakup and analysis of the market based on the product. This includes EW equipment and EW operational support.

### Breakup by Equipment:

*Electronic Warfare Market Report by Product (EW Equipment, EW Operational Support), Equipment (Jammer, Counter...*

Jammer  
Countermeasure System  
Decoy  
Directed Energy Weapon  
Others

A detailed breakup and analysis of the market based on the equipment have also been provided in the report. This includes jammer, countermeasure system, decoy, directed energy weapon, and others.

Breakup by Capacity:

Electronic Protection  
Electronic Support  
Electronic Attack

The report has provided a detailed breakup and analysis of the market based on the capacity. This includes electronic protection, electronic support, and electronic attack.

Breakup by Platform:

Land  
Naval  
Airborne  
Space

The report has provided a detailed breakup and analysis of the market based on the platform. This includes land, naval, airborne, and space.

Breakup by Region:

North America  
United States  
Canada  
Asia-Pacific  
China  
Japan  
India

South Korea  
Australia  
Indonesia  
Others  
Europe  
Germany  
France  
United Kingdom  
Italy  
Spain  
Russia  
Others  
Latin America  
Brazil  
Mexico  
Others  
Middle East and Africa

The market research report has also provided a comprehensive analysis of all the major regional markets, which include North America (the United States and Canada); Europe (Germany, France, the United Kingdom, Italy, Spain, Russia, and others); Asia Pacific (China, Japan, India, South Korea, Australia, Indonesia, and others); Latin America (Brazil, Mexico, and others); and the Middle East and Africa.

The market research report has provided a comprehensive analysis of the competitive landscape. Detailed profiles of all major companies have also been provided. Some of the key players in the market include:

Aselsan A.S  
BAE Systems plc  
Elbit Systems Ltd.  
General Dynamics Corporation  
Israel Aerospace Industries  
L3Harris Technologies Inc.  
Leonardo S.p.A.  
Lockheed Martin Corporation  
Northrop Grumman Corporation  
Raytheon Technologies Corporation  
Saab AB

Teledyne Technologies Incorporated  
Textron Inc.  
Thales Group  
The Boeing Company.

### Key Questions Answered in This Report

1. What was the size of the global electronic warfare market in 2023?
2. What is the expected growth rate of the global electronic warfare market during 2024-2032?
3. What are the key factors driving the global electronic warfare market?
4. What has been the impact of COVID-19 on the global electronic warfare market?
5. What is the breakup of the global electronic warfare market based on the product?
6. What is the breakup of the global electronic warfare market based on the capacity?
7. What is the breakup of the global electronic warfare market based on the platform?
8. What are the key regions in the global electronic warfare market?
9. Who are the key players/companies in the global electronic warfare market?

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