

Global Air Route Surveillance Radar(ARSR) Market Growth 2026-2032

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Abstracts

The global Air Route Surveillance Radar(ARSR) market size is predicted to grow from US\$ 181 million in 2025 to US\$ 210 million in 2032; it is expected to grow at a CAGR of 2.1% from 2026 to 2032.

The Air Route Surveillance Radar (ARSR) is a long-range search radar used to monitor the flight conditions of aircraft on the route. It is usually set up at the air traffic control center or corresponding waypoint, and has a large detection range, generally more than 250 nautical miles and an altitude of up to 13,000 meters. Route surveillance radar generally operates at the L-band frequency, about 1250-1350MHz, taking into account many factors such as azimuth resolution, antenna size, transmission loss, transmission power, economic indicators, etc. This radar has greater power than airport surveillance radar and can Covering the entire route allows controllers to implement radar separation for aircraft flying on the route, thereby improving flight safety and air traffic efficiency.

The upstream sector primarily comprises large antenna arrays, turntable/servo systems, transmit-receive modules, power amplifiers, low-noise receivers, frequency synthesizer modules, signal processing boards, and radar processing software; among these, highly reliable transmit-receive links, digital signal processing, clutter suppression, anti-interference capabilities, remote maintenance, and networked interfaces constitute the core elements. The downstream sector primarily serves civil air traffic control agencies, military air traffic control departments, air defense command systems, border and coastal surveillance units, and air traffic management authorities in remote regions; key concerns for these customers include detection range, low-altitude coverage, system availability, cybersecurity, and lifecycle costs.

In 2025, global sales of air route surveillance radars are projected to range between 30

and 40 units, with an average price per unit of approximately \$4 million to \$6 million and a gross margin of 32% to 45%.

Industry demand for Air Route Surveillance Radar is primarily driven by the need for airspace operational safety, the replacement of aging radar systems, coverage of remote air routes, civil-military airspace coordination, and the surveillance of non-cooperative targets. As a long-range primary surveillance radar, the ARSR is capable of detecting targets without relying on onboard transponders; consequently, it retains irreplaceable value in scenarios involving transponder failure, deactivated transponders, non-cooperative aircraft, and homeland air defense. Key industry barriers include high capital investment for the complete system, the complexity of site construction and spectrum coordination, lengthy certification cycles, and high long-term operation and maintenance costs. Global market opportunities stem more from the modernization of air traffic control infrastructure and the demand for high reliability and safety redundancy, rather than from the mere expansion of the network through the addition of new sites.

LP Information, Inc. (LPI) ' newest research report, the "Air Route Surveillance Radar(ARSR) Industry Forecast" looks at past sales and reviews total world Air Route Surveillance Radar(ARSR) sales in 2025, providing a comprehensive analysis by region and market sector of projected Air Route Surveillance Radar(ARSR) sales for 2026 through 2032. With Air Route Surveillance Radar(ARSR) sales broken down by region, market sector and sub-sector, this report provides a detailed analysis in US\$ millions of the world Air Route Surveillance Radar(ARSR) industry.

This Insight Report provides a comprehensive analysis of the global Air Route Surveillance Radar(ARSR) landscape and highlights key trends related to product segmentation, company formation, revenue, and market share, latest development, and M&A activity. This report also analyzes the strategies of leading global companies with a focus on Air Route Surveillance Radar(ARSR) portfolios and capabilities, market entry strategies, market positions, and geographic footprints, to better understand these firms' unique position in an accelerating global Air Route Surveillance Radar(ARSR) market.

This Insight Report evaluates the key market trends, drivers, and affecting factors shaping the global outlook for Air Route Surveillance Radar(ARSR) and breaks down the forecast by Type, by Application, geography, and market size to highlight emerging pockets of opportunity. With a transparent methodology based on hundreds of bottom-up qualitative and quantitative market inputs, this study forecast offers a highly nuanced

view of the current state and future trajectory in the global Air Route Surveillance Radar(ARSR).

This report presents a comprehensive overview, market shares, and growth opportunities of Air Route Surveillance Radar(ARSR) market by product type, application, key manufacturers and key regions and countries.

Segmentation by Type:

L Band

S Band

Segmentation by Coordinate Dimensions:

2-Coordinate Type

3-Coordinate Type

Segmentation by Deployment Configuration:

Fixed Type

Mobile Type

Segmentation by Application:

Commercial

Military

This report also splits the market by region:

Americas

United States

Canada

Mexico

Brazil

APAC

China

Japan

Korea

Southeast Asia

India

Australia

Europe

Germany

France

UK

Italy

Russia

Middle East & Africa

Egypt

South Africa

Israel

Turkey

GCC Countries

The below companies that are profiled have been selected based on inputs gathered from primary experts and analysing the company's coverage, product portfolio, its market penetration.

Collins Aerospace

Indra

Thales

ELDIS Pardubice

Easat Radar Systems

Leonardo

Sun Create

Key Questions Addressed in this Report

What is the 10-year outlook for the global Air Route Surveillance Radar(ARSR) market?

What factors are driving Air Route Surveillance Radar(ARSR) market growth, globally and by region?

Which technologies are poised for the fastest growth by market and region?

How do Air Route Surveillance Radar(ARSR) market opportunities vary by end market size?

How does Air Route Surveillance Radar(ARSR) break out by Type, by Application?

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