

Global Low-altitude Integrated Sensing and Communication (ISAC) Surveillance System Market Growth 2026-2032

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Abstracts

The global Low-altitude Integrated Sensing and Communication (ISAC) Surveillance System market size is predicted to grow from US\$ 1080 million in 2025 to US\$ 6067 million in 2032; it is expected to grow at a CAGR of 27.5% from 2026 to 2032.

In 2025, global shipments of Low-altitude Integrated Sensing and Communication Surveillance Systems reached approximately 1,840 sets, with an average system price of about K US\$ 600 per set. A Low-altitude Integrated Sensing and Communication Surveillance System is a system-level surveillance product designed for drones, eVTOL aircraft, general aviation aircraft and low-slow-small aerial targets. It typically consists of integrated sensing and communication equipment, low-altitude surveillance radar, radio identification devices, electro-optical and infrared sensors, multi-source fusion platforms, edge computing units and alerting and command software. By combining communication-sensing integration, radar detection, spectrum identification, Remote ID, ADS-B, electro-optical confirmation and multi-source data fusion, the system enables low-altitude target detection, identification, positioning, velocity measurement, trajectory tracking, abnormal flight alerting and airspace situational awareness. It is mainly used in urban public low-altitude governance, aviation operation protection, civil critical site protection, defense and border security, industrial low-altitude operation support, and emergency and temporary public safety scenarios.

Low-altitude Integrated Sensing and Communication Surveillance Systems are evolving from conventional counter-drone security equipment into a critical sensing layer of low-altitude economy infrastructure. As drone logistics, urban inspection, emergency response, eVTOL pilot operations and low-altitude route management continue to develop, the key challenge for regulators and operators is no longer simply whether

aircraft can fly, but whether low-altitude targets can be detected, identified, continuously tracked and safely managed. Therefore, the value of this system lies not only in detecting unauthorized drones, but also in providing real-time situational awareness for urban low-altitude governance, airport operation protection, critical site security and industrial low-altitude operations.

From a market perspective, the global market size of Low-altitude Integrated Sensing and Communication Surveillance Systems is estimated at approximately US\$1,103.8 million in 2025 and is expected to reach US\$1,444.3 million in 2026, with a projected CAGR of around 26.5% from 2026 to 2032. Growth is mainly driven by three layers of demand. The first is non-cooperative target detection, including low-slow-small drones, unauthorized flights and sensitive-area intrusion monitoring. The second is cooperative target surveillance, including Remote ID, ADS-B, BVLOS operation support and low-altitude route monitoring. The third is the accelerated deployment of 5G-A integrated sensing and communication, low-altitude radar and multi-source fusion platforms in city-level low-altitude infrastructure projects. Overall, the market is still transitioning from pilot projects to scaled deployment, with near-term demand mainly coming from governments, airports, defense and law enforcement agencies, energy companies and critical infrastructure operators.

The competitive landscape will not be dominated by a single type of player. Instead, it will involve communication equipment vendors, radar manufacturers, radio-frequency sensing providers, electro-optical and infrared system suppliers, multi-source fusion platform companies and low-altitude security control system providers. Huawei, ZTE and Ericsson represent the network sensing route; Echodyne, Robin Radar, Terma, Weibel, Naruida, Glarun Technology and Sun Create represent the low-altitude radar route; Aaronia, Rohde & Schwarz, D-Fend Solutions, Shanghai Terjin and Lizheng Technology represent the radio sensing and identification route; while IAI, Thales, Teledyne FLIR, Hikvision, GEOVIS and LES Information are more representative of multi-source fusion and system-level solutions. In the long run, companies with stronger competitiveness will not be those offering only a single sensor, but those capable of integrating radar, RF sensing, electro-optical systems, Remote ID, ADS-B and low-altitude airspace data into a practical and actionable situational awareness system.

It should also be noted that the market still faces several uncertainties, including inconsistent statistical boundaries, a high share of project-based revenue, immature standards, and different regulatory timelines across countries. Some companies claim exposure to the low-altitude economy, but their actual business may only involve general security cameras, ordinary communication networks, standalone jamming

devices or system integration services. These should not be directly counted as core suppliers of Low-altitude Integrated Sensing and Communication Surveillance Systems. For market sizing and company screening, a medium-narrow scope is more appropriate, focusing on system-level products with low-altitude target detection, identification, positioning, tracking, alerting and situational awareness capabilities. Overall, this is a policy-driven and infrastructure-oriented market with strong purchasing interest, but it remains in an early expansion stage. The next three to five years will be a key window for the market to move from demonstration projects toward regional-scale deployment.

LP Information, Inc. (LPI) ' newest research report, the “Low-altitude Integrated Sensing and Communication (ISAC) Surveillance System Industry Forecast” looks at past sales and reviews total world Low-altitude Integrated Sensing and Communication (ISAC) Surveillance System sales in 2025, providing a comprehensive analysis by region and market sector of projected Low-altitude Integrated Sensing and Communication (ISAC) Surveillance System sales for 2026 through 2032. With Low-altitude Integrated Sensing and Communication (ISAC) Surveillance System sales broken down by region, market sector and sub-sector, this report provides a detailed analysis in US\$ millions of the world Low-altitude Integrated Sensing and Communication (ISAC) Surveillance System industry.

This Insight Report provides a comprehensive analysis of the global Low-altitude Integrated Sensing and Communication (ISAC) Surveillance System 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 Low-altitude Integrated Sensing and Communication (ISAC) Surveillance System portfolios and capabilities, market entry strategies, market positions, and geographic footprints, to better understand these firms' unique position in an accelerating global Low-altitude Integrated Sensing and Communication (ISAC) Surveillance System market.

This Insight Report evaluates the key market trends, drivers, and affecting factors shaping the global outlook for Low-altitude Integrated Sensing and Communication (ISAC) Surveillance System 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 Low-altitude Integrated Sensing and Communication (ISAC) Surveillance System.

This report presents a comprehensive overview, market shares, and growth opportunities of Low-altitude Integrated Sensing and Communication (ISAC) Surveillance System market by product type, application, key manufacturers and key regions and countries.

Segmentation by Type:

Network Sensing Type

Radar Surveillance Type

Radio Sensing Type

Electro Optical Type

Fusion Awareness Type

Other

Segmentation by Deployment Type:

Fixed Deployment Type

Mobile Vehicle Type

Portable Deployment Type

Platform Service Type

Segmentation by Target Attribute:

Cooperative Target Surveillance

Non Cooperative Target Surveillance

Mixed Target Surveillance

Segmentation by Application:

Urban Public Low Altitude Governance

Aviation Operation Protection

Civil Critical Site Protection

Defense and Border Security

Industrial Low Altitude Operation Support

Emergency and Temporary Public Safety

Other

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.

Huawei Technologies Co., Ltd.

ZTE Corporation

Ericsson AB

CICT Mobile Communication Technology Co., Ltd.

Echodyne Corp.

Fortem Technologies, Inc.

MatrixSpace, Inc.

DeTect, Inc.

SRC, Inc.

Spotter Global, Inc.

Robin Radar Systems B.V.

Blighter Surveillance Systems Ltd.

Terma A/S

Weibel Scientific A/S

Advanced Protection Systems S.A.

Meteksan Defence Industry Inc.

Thales S.A.

HENSOLDT AG

Saab AB

Leonardo S.p.A.

Indra Sistemas, S.A.

Israel Aerospace Industries Ltd.

Toshiba Corporation

Mitsubishi Electric Corporation

Hanwha Systems Co., Ltd.

LIG Nex1 Co., Ltd.

Bharat Electronics Limited

Tron Future Tech Inc.

Guangdong Naruida Technology Co., Ltd.

Anhui Sun Create Electronics Co., Ltd.

Glarun Technology Co., Ltd.

Aerospace Nanhu Electronic Information Technology Co., Ltd.

Novasky Technology Co., Ltd.

Nanjing Tianlang Defense Technology Co., Ltd.

Sichuan Jiuzhou Electric Co., Ltd.

Guangzhou Haige Communications Group Incorporated Company

Hidden Level, Inc.

Rohde & Schwarz GmbH & Co. KG

uAvionix Corporation

Aaronia AG

CRFS Limited

Sentrycs Ltd.

D-Fend Solutions AD Ltd.

DroneShield Ltd.

MyDefence A/S

Shanghai Terjin Radio Technology Co., Ltd.

Beijing Lizheng Technology Co., Ltd.

Beijing Telesound Electronics Co., Ltd.

Teledyne FLIR Defense

Hangzhou Hikvision Digital Technology Co., Ltd.

Rafael Advanced Defense Systems Ltd.

Electro Optic Systems Holdings Limited

QinetiQ Group plc

ST Engineering Ltd.

Zen Technologies Limited

Greene Robotics Pvt. Ltd.

Nanjing LES Information Technology Co., Ltd.

GEOVIS Technology Co., Ltd.

Key Questions Addressed in this Report

What is the 10-year outlook for the global Low-altitude Integrated Sensing and Communication (ISAC) Surveillance System market?

What factors are driving Low-altitude Integrated Sensing and Communication (ISAC) Surveillance System market growth, globally and by region?

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

How do Low-altitude Integrated Sensing and Communication (ISAC) Surveillance System market opportunities vary by end market size?

How does Low-altitude Integrated Sensing and Communication (ISAC) Surveillance System break out by Type, by Application?

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