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Global Military and Defense Semiconductor Market Growth (Status and Outlook) 2026-2032

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Abstracts

The global Military and Defense Semiconductor market size is predicted to grow from US$ 4468 million in 2025 to US$ 6738 million in 2032; it is expected to grow at a CAGR of 6.2% from 2026 to 2032.

Military & defense semiconductors are mission-critical, high-reliability microelectronics purposely designed, manufactured, screened and qualified to operate in harsh environments and over long lifetimes across radars, EW, communications, navigation, guidance, spacecraft and precision-strike systems. Quality and reliability are governed by MIL-PRF-38535 (general performance requirements for ICs) and MIL-STD-883 (test methods for microcircuits), while space programs follow NASA EEE-INST-002 for parts selection/screening/derating. Export-control frameworks—USML Category XI (military electronics) under ITAR and EAR/CCL Category 3 (electronics)—define licensing and compliance boundaries. From a product taxonomy perspective, the A&D segment can be mapped to the broader device classes—microprocessors/SoCs, memories, integrated circuits (analog/mixed-signal/data converters), logic/programmable logic (e.g., FPGAs), optoelectronics (IR/laser/optical), and other discretes & power devices—with significantly stricter hardening, screening and in-mission reliability requirements than commercial markets.

Key materials and processes span Si/SiGe BiCMOS (RF transceivers/mixers/control), GaAs & InP (low-noise/high-frequency front-ends), rapidly scaling GaN-on-SiC (AESA radar/EW high-power PAs), and SiC power devices. For optoelectronics, space/defense IR payloads rely on HgCdTe (MCT), InSb, SWIR/LWIR/VLWIR detector FPAs and integrated gimbals. GaN-on-SiC brings higher power density and temperature capability, delivering longer range/efficiency and improved SWaP-C in radar/EW front-ends. On the application side, AESA radars (e.g., RTX APG-82(V)X; Northrop

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Grumman G/ATOR), EW/EA/ESM, SATCOM & tactical links, navigation/guidance, ISR payloads, and EO/IR turrets are core demand centers; Lynred and Teledyne FLIR, among others, have deep heritage in space-grade and defense IR detectors and payloads.

Three structural vectors define the market today: (1) RF front-ends migrating to GaN-on-SiC, raising output power, bandwidth and jamming resilience; (2) space electronics prioritizing “on-orbit reconfigurability & low power,” with radiation-tolerant/hardened FPGAs (e.g., AMD XQRKU060, Microchip RT PolarFire & RT PolarFire SoC) entering payload processing thanks to TID/SEE robustness and zero configuration upsets; (3) advanced packaging & trusted access, as DMEA Trusted/TAPO and the DoD’s SHIP heterogeneous-integration initiatives couple leading-edge commercial silicon with hardened die in secure assembly/packaging flows, shrinking insertion timelines while preserving assurance. Growth is propelled by demands for situational awareness & EW survivability, proliferated LEO constellations & tactical comms, and relentless SWaP-C/through-life-cost pressure.Upstream, semi-insulating SiC substrates & GaN epitaxy are strategic inputs for defense RF—providers such as Wolfspeed and Coherent supply 150–200 mm material platforms for GaN-on-SiC RF devices. In assembly/qualification, QML-certified houses (e.g., Micross, Class Q/V under MIL-PRF-38535) execute hermetic packaging, burn-in and screening per MIL-STD-883 and EEE-INST-002. Downstream, system primes like RTX and Northrop Grumman integrate GaN/hardened devices across AESA radars, EW systems and sensors. Cross-border flows are tightly shaped by USML Category XI/EAR Category 3 and the Trusted Supplier ecosystem managed by DMEA’s TAPO.

Report Scope

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

This Insight Report provides a comprehensive analysis of the global Military and Defense Semiconductor landscape and highlights key trends related to product segmentation, company formation, revenue, and market share, latest development, and M&A activity. This report also analyses the strategies of leading global companies with

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a focus on Military and Defense Semiconductor portfolios and capabilities, market entry strategies, market positions, and geographic footprints, to better understand these firms' unique position in an accelerating global Military and Defense Semiconductor market.

This Insight Report evaluates the key market trends, drivers, and affecting factors shaping the global outlook for Military and Defense Semiconductor and breaks down the forecast by Device Class, 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 Military and Defense Semiconductor.

This report presents a comprehensive overview, market shares, and growth opportunities of Military and Defense Semiconductor market by product type, application, key players and key regions and countries.

Market Segmentation

Segmentation by Device Class:

RF & Microwave

Microprocessors & MCUs

Memory Chips

Analog / Mixed-Signal

Logic (FPGAs / PLDs / Custom Logic)

Optoelectronics & Sensors

Power Discretes & Modules

Segmentation by Process Platform:

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Silicon/SOI/SiGe BiCMOS

GaAs and InP

GaN-on-SiC

SiC Power Devices

Infrared/Electro-Optical Materials

Segmentation by Semiconductor Material:

Silicon (Si)

GaAs

GaN (RF)

SiGe

SiC (power)

InP/IR materials (HgCdTe/MCT, InSb, InGaAs)

Segmentation by Application:

AESA Radar / Fire Control & Surveillance Radar

Electronic Warfare (EA/ESM/EP)

Secure Tactical Communications & SATCOM

Avionics/Guidance/Mission Computing

EO/IR Sensing, Targeting & Seekers

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Spacecraft Bus & Payload Electronics

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

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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 analyzing the company's coverage, product portfolio, its market penetration.

Infineon

Onsemi

NXP

Sumitomo

Microchip

Wolfspeed

MACOM

AMD (Xilinx)

BAE Systems

CAES (Cobham Advanced Electronic Solutions)

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Mercury Systems

Northrop Grumman Microelectronics

Raytheon (RTX)

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Great Microwave Technology

Zhejiang Chengchang Technology

Chengdu Ganide Technology

Guobo Electronics

Yaguang Technology

Chongqing Southwest Integrated Circuit Design

Talkweb Information System

Hefei IC Valley Microelectronics

KCB Solutions

Archiwave

Tianjin HiGaAs Microwave Technology

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