

Global S-band Primary Surveillance Radar Market Growth 2026-2032

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Abstracts

The global S-band Primary Surveillance Radar market size is predicted to grow from US\$ 264 million in 2025 to US\$ 313 million in 2032; it is expected to grow at a CAGR of 2.6% from 2026 to 2032.

S-band Primary Surveillance Radar (PSR) is a non-cooperative primary radar system utilized for air traffic control. Typically operating within the S-band frequency range of approximately 2.7-2.9 GHz, it acquires information such as target azimuth, range, and trajectory by transmitting electromagnetic waves into the airspace and receiving echoes reflected back by aircraft or other targets; notably, it does not rely on responses from onboard transponders. Its core value lies in its ability to detect targets that have failed to activate their transponders, targets with malfunctioning transponders, or non-cooperative targets. It is primarily deployed for surveillance within airport terminal areas, for approach control, within certain extended terminal areas, and in airspace shared by both military and civil aviation.

The upstream supply chain primarily comprises RF power devices, transmit-receive modules, antenna arrays, rotary servo mechanisms, low-noise receiving chains, frequency sources, signal processing boards, and control and monitoring systems. Among these components, solid-state transmitters, GaN power modules, digital receivers, and clutter suppression algorithms are the key factors that determine the system's detection performance, reliability, and maintenance costs. The downstream market consists mainly of civil aviation authorities, airports, and air force bases; when making procurement decisions, these entities prioritize factors such as detection range, the capability to detect low-altitude targets, and resistance to both clutter and interference from wind farms.

In 2025, the global market for new S-band Primary Surveillance Radar units is projected to see sales of approximately 60 units. The average unit price is estimated to range between \$4 million and \$5 million, while leading manufacturers are expected to maintain gross profit margins ranging from 35% to 50%.

United States market for S-band Primary Surveillance Radar is estimated to increase from US\$ million in 2025 to US\$ million by 2032, at a CAGR of % from 2026 through 2032.

China market for S-band Primary Surveillance Radar is estimated to increase from US\$ million in 2025 to US\$ million by 2032, at a CAGR of % from 2026 through 2032.

Europe market for S-band Primary Surveillance Radar is estimated to increase from US\$ million in 2025 to US\$ million by 2032, at a CAGR of % from 2026 through 2032.

Global key S-band Primary Surveillance Radar players cover Indra, Leonardo, Thales, RTX, L3Harris, etc. In terms of revenue, the global two largest companies occupied for a share nearly % in 2025.

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

This Insight Report provides a comprehensive analysis of the global S-band Primary Surveillance Radar 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 S-band Primary Surveillance Radar portfolios and capabilities, market entry strategies, market positions, and geographic footprints, to better understand these firms' unique position in an accelerating global S-band Primary Surveillance Radar market.

This Insight Report evaluates the key market trends, drivers, and affecting factors shaping the global outlook for S-band Primary Surveillance Radar 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 S-band Primary Surveillance Radar.

This report presents a comprehensive overview, market shares, and growth opportunities of S-band Primary Surveillance Radar market by product type, application, key manufacturers and key regions and countries.

Segmentation by Type:

All-Solid-State

GaN Solid-State

Segmentation by Detection Range:

? 60 Nautical Miles

? 80 Nautical Miles

? 100 Nautical Miles

Segmentation by Application:

Civilian Use

Military Use

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.

Indra

Leonardo

Thales

RTX

L3Harris

Eldis Pardubice

Easat Radar Systems

Sun Create

Glarun Technology

Key Questions Addressed in this Report

What is the 10-year outlook for the global S-band Primary Surveillance Radar market?

What factors are driving S-band Primary Surveillance Radar market growth, globally and by region?

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

How do S-band Primary Surveillance Radar market opportunities vary by end market size?

How does S-band Primary Surveillance Radar break out by Type, by Application?

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