

Global Targeting Pods (TGP) Market Growth 2026-2032

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Abstracts

The global Targeting Pods (TGP) market size is predicted to grow from US\$ 2107 million in 2025 to US\$ 3036 million in 2032; it is expected to grow at a CAGR of 5.2% from 2026 to 2032.

The targeting pod (TGP) is a specific type of airborne electro-optical payload dedicated to the delivery of precision-guided weapons. While it can be seen as a functional extension of the electro-optical pod in weapon guidance, its core mission is highly focused. It is not merely reconnaissance and sensing equipment, but an essential combat component carried by fighter jets and attack aircraft. It is used to detect, identify, automatically track, and lock onto ground or sea targets at long range, ultimately emitting coded lasers to guide laser-guided bombs, missiles, and other munitions, while simultaneously generating precise target coordinates to guide satellite-guided munitions. The targeting pod (TGP) integrates a high-resolution forward-looking infrared (FLIR) system, a high-definition CCD television camera, a dual-mode laser, a laser rangefinder, and an inertial navigation system, maintaining line-of-sight stability through a two- or three-axis high-precision servo stabilization platform.

In 2025, global Targeting Pods (TGP) sale reached approximately 4,240 Units, with an average global market price of around 508 K US\$/Unit. Production capacity reached 5,500 Units, with a gross profit margin of approximately 38%.

The upstream segment mainly consists of mid-wave/short-wave infrared detectors, high-definition visible light cameras, low-light sensors, laser ranging and illumination modules, inertial stabilization platforms, precision servos, image processing electronics, and airborne data link interfaces. These components collectively determine the pod's detection range, identification accuracy, and weapon guidance capabilities. Midstream

companies include Lockheed Martin's Sniper, Northrop Grumman's LITENING system (developed jointly with Rafael), and Thales' TALIOS. While Leonardo and HENSOLDT primarily offer airborne electro-optical/infrared, surveillance, and target designation solutions, this also reflects the European supply chain's trend towards integrating target designation, intelligence, surveillance, and reconnaissance (ISR), and platforms into a unified mission system. The downstream market is highly concentrated on existing fighter, attack, and upgraded fleet platforms for air forces and naval aviation, as well as UAVs and special mission aircraft requiring lightweight targeting/ISTAR payloads.

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

This Insight Report provides a comprehensive analysis of the global Targeting Pods (TGP) 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 Targeting Pods (TGP) portfolios and capabilities, market entry strategies, market positions, and geographic footprints, to better understand these firms' unique position in an accelerating global Targeting Pods (TGP) market.

This Insight Report evaluates the key market trends, drivers, and affecting factors shaping the global outlook for Targeting Pods (TGP) 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 Targeting Pods (TGP).

This report presents a comprehensive overview, market shares, and growth opportunities of Targeting Pods (TGP) market by product type, application, key manufacturers and key regions and countries.

Segmentation by Type:

Multispectral

Hyperspectral

Segmentation by Specifications:

Small Optoelectronic Pods

Medium Optoelectronic Pods

Large Optoelectronic Pods

Segmentation by Stabilization Architecture:

2-axis Stabilized Gimbals

3-axis Stabilized Gimbals

4-axis Stabilized Gimbals

Segmentation by Application:

National Defense

Air Traffic

Drone Industry

Others

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.

Teledyne FLIR

Hensoldt

AVIC Jonhon Optronic Technology

Lockheed Martin

Thales

Rafael Advanced Defense Systems Ltd.

Northrop Grumman

Elbit Systems

BAE Systems

Leonardo

Safran

Israel Aerospace Industries

Aselsan

Elcarim Optronic

Resonon Inc

Headwall Photonics

Wuhan JOHO Technology

Changchun Tongshi Optoelectronic Technology

Beijing StarNeto Technology

Key Questions Addressed in this Report

What is the 10-year outlook for the global Targeting Pods (TGP) market?

What factors are driving Targeting Pods (TGP) market growth, globally and by region?

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

How do Targeting Pods (TGP) market opportunities vary by end market size?

How does Targeting Pods (TGP) break out by Type, by Application?

Contents

1 SCOPE OF THE REPORT

- 1.1 Market Introduction
- 1.2 Years Considered
- 1.3 Research Objectives
- 1.4 Market Research Methodology
- 1.5 Research Process and Data Source
- 1.6 Economic Indicators
- 1.7 Currency Considered
- 1.8 Market Estimation Caveats

2 EXECUTIVE SUMMARY

- 2.1 World Market Overview
 - 2.1.1 Global Targeting Pods (TGP) Annual Sales 2021-2032
 - 2.1.2 World Current & Future Analysis for Targeting Pods (TGP) by Geographic Region, 2021, 2025 & 2032
 - 2.1.3 World Current & Future Analysis for Targeting Pods (TGP) by Country/Region, 2021, 2025 & 2032
- 2.2 Targeting Pods (TGP) Segment by Type
 - 2.2.1 Multispectral
 - 2.2.2 Hyperspectral
 - 2.2.3 Targeting Pods (TGP) Sales by Type
 - 2.2.3.1 Global Targeting Pods (TGP) Sales Market Share by Type (2021-2026)
 - 2.2.3.2 Global Targeting Pods (TGP) Revenue and Market Share by Type (2021-2026)
 - 2.2.3.3 Global Targeting Pods (TGP) Sale Price by Type (2021-2026)
- 2.3 Targeting Pods (TGP) Segment by Specifications
 - 2.3.1 Small Optoelectronic Pods
 - 2.3.2 Medium Optoelectronic Pods
 - 2.3.3 Large Optoelectronic Pods
 - 2.3.4 Targeting Pods (TGP) Sales by Specifications
 - 2.3.4.1 Global Targeting Pods (TGP) Sales Market Share by Specifications (2021-2026)
 - 2.3.4.2 Global Targeting Pods (TGP) Revenue and Market Share by Specifications (2021-2026)
 - 2.3.4.3 Global Targeting Pods (TGP) Sale Price by Specifications (2021-2026)

2.4 Targeting Pods (TGP) Segment by Stabilization Architecture

2.4.1 2-axis Stabilized Gimbals

2.4.2 3-axis Stabilized Gimbals

2.4.3 4-axis Stabilized Gimbals

2.4.4 Targeting Pods (TGP) Sales by Stabilization Architecture

2.4.4.1 Global Targeting Pods (TGP) Sales Market Share by Stabilization Architecture (2021-2026)

2.4.4.2 Global Targeting Pods (TGP) Revenue and Market Share by Stabilization Architecture (2021-2026)

2.4.4.3 Global Targeting Pods (TGP) Sale Price by Stabilization Architecture (2021-2026)

2.5 Targeting Pods (TGP) Segment by Application

2.5.1 National Defense

2.5.2 Air Traffic

2.5.3 Drone Industry

2.5.4 Others

2.5.5 Targeting Pods (TGP) Sales by Application

2.5.5.1 Global Targeting Pods (TGP) Sale Market Share by Application (2021-2026)

2.5.5.2 Global Targeting Pods (TGP) Revenue and Market Share by Application (2021-2026)

2.5.5.3 Global Targeting Pods (TGP) Sale Price by Application (2021-2026)

3 GLOBAL BY COMPANY

3.1 Global Targeting Pods (TGP) Breakdown Data by Company

3.1.1 Global Targeting Pods (TGP) Annual Sales by Company (2021-2026)

3.1.2 Global Targeting Pods (TGP) Sales Market Share by Company (2021-2026)

3.2 Global Targeting Pods (TGP) Annual Revenue by Company (2021-2026)

3.2.1 Global Targeting Pods (TGP) Revenue by Company (2021-2026)

3.2.2 Global Targeting Pods (TGP) Revenue Market Share by Company (2021-2026)

3.3 Global Targeting Pods (TGP) Sale Price by Company

3.4 Key Manufacturers Targeting Pods (TGP) Producing Area Distribution, Sales Area, Product Type

3.4.1 Key Manufacturers Targeting Pods (TGP) Product Location Distribution

3.4.2 Players Targeting Pods (TGP) Products Offered

3.5 Market Concentration Rate Analysis

3.5.1 Competition Landscape Analysis

3.5.2 Concentration Ratio (CR3, CR5 and CR10) & (2024-2026)

3.6 New Products and Potential Entrants

3.7 Market M&A Activity & Strategy

4 WORLD HISTORIC REVIEW FOR TARGETING PODS (TGP) BY GEOGRAPHIC REGION

4.1 World Historic Targeting Pods (TGP) Market Size by Geographic Region (2021-2026)

4.1.1 Global Targeting Pods (TGP) Annual Sales by Geographic Region (2021-2026)

4.1.2 Global Targeting Pods (TGP) Annual Revenue by Geographic Region (2021-2026)

4.2 World Historic Targeting Pods (TGP) Market Size by Country/Region (2021-2026)

4.2.1 Global Targeting Pods (TGP) Annual Sales by Country/Region (2021-2026)

4.2.2 Global Targeting Pods (TGP) Annual Revenue by Country/Region (2021-2026)

4.3 Americas Targeting Pods (TGP) Sales Growth

4.4 APAC Targeting Pods (TGP) Sales Growth

4.5 Europe Targeting Pods (TGP) Sales Growth

4.6 Middle East & Africa Targeting Pods (TGP) Sales Growth

5 AMERICAS

5.1 Americas Targeting Pods (TGP) Sales by Country

5.1.1 Americas Targeting Pods (TGP) Sales by Country (2021-2026)

5.1.2 Americas Targeting Pods (TGP) Revenue by Country (2021-2026)

5.2 Americas Targeting Pods (TGP) Sales by Type (2021-2026)

5.3 Americas Targeting Pods (TGP) Sales by Application (2021-2026)

5.4 United States

5.5 Canada

5.6 Mexico

5.7 Brazil

6 APAC

6.1 APAC Targeting Pods (TGP) Sales by Region

6.1.1 APAC Targeting Pods (TGP) Sales by Region (2021-2026)

6.1.2 APAC Targeting Pods (TGP) Revenue by Region (2021-2026)

6.2 APAC Targeting Pods (TGP) Sales by Type (2021-2026)

6.3 APAC Targeting Pods (TGP) Sales by Application (2021-2026)

6.4 China

6.5 Japan

- 6.6 South Korea
- 6.7 Southeast Asia
- 6.8 India
- 6.9 Australia
- 6.10 China Taiwan

7 EUROPE

- 7.1 Europe Targeting Pods (TGP) by Country
 - 7.1.1 Europe Targeting Pods (TGP) Sales by Country (2021-2026)
 - 7.1.2 Europe Targeting Pods (TGP) Revenue by Country (2021-2026)
- 7.2 Europe Targeting Pods (TGP) Sales by Type (2021-2026)
- 7.3 Europe Targeting Pods (TGP) Sales by Application (2021-2026)
- 7.4 Germany
- 7.5 France
- 7.6 UK
- 7.7 Italy
- 7.8 Russia

8 MIDDLE EAST & AFRICA

- 8.1 Middle East & Africa Targeting Pods (TGP) by Country
 - 8.1.1 Middle East & Africa Targeting Pods (TGP) Sales by Country (2021-2026)
 - 8.1.2 Middle East & Africa Targeting Pods (TGP) Revenue by Country (2021-2026)
- 8.2 Middle East & Africa Targeting Pods (TGP) Sales by Type (2021-2026)
- 8.3 Middle East & Africa Targeting Pods (TGP) Sales by Application (2021-2026)
- 8.4 Egypt
- 8.5 South Africa
- 8.6 Israel
- 8.7 Turkey
- 8.8 GCC Countries

9 MARKET DRIVERS, CHALLENGES AND TRENDS

- 9.1 Market Drivers & Growth Opportunities
- 9.2 Market Challenges & Risks
- 9.3 Industry Trends

10 MANUFACTURING COST STRUCTURE ANALYSIS

- 10.1 Raw Material and Suppliers
- 10.2 Manufacturing Cost Structure Analysis of Targeting Pods (TGP)
- 10.3 Manufacturing Process Analysis of Targeting Pods (TGP)
- 10.4 Industry Chain Structure of Targeting Pods (TGP)

11 MARKETING, DISTRIBUTORS AND CUSTOMER

- 11.1 Sales Channel
 - 11.1.1 Direct Channels
 - 11.1.2 Indirect Channels
- 11.2 Targeting Pods (TGP) Distributors
- 11.3 Targeting Pods (TGP) Customer

12 WORLD FORECAST REVIEW FOR TARGETING PODS (TGP) BY GEOGRAPHIC REGION

- 12.1 Global Targeting Pods (TGP) Market Size Forecast by Region
 - 12.1.1 Global Targeting Pods (TGP) Forecast by Region (2027-2032)
 - 12.1.2 Global Targeting Pods (TGP) Annual Revenue Forecast by Region (2027-2032)
- 12.2 Americas Forecast by Country (2027-2032)
- 12.3 APAC Forecast by Region (2027-2032)
- 12.4 Europe Forecast by Country (2027-2032)
- 12.5 Middle East & Africa Forecast by Country (2027-2032)
- 12.6 Global Targeting Pods (TGP) Forecast by Type (2027-2032)
- 12.7 Global Targeting Pods (TGP) Forecast by Application (2027-2032)

13 KEY PLAYERS ANALYSIS

- 13.1 Teledyne FLIR
 - 13.1.1 Teledyne FLIR Company Information
 - 13.1.2 Teledyne FLIR Targeting Pods (TGP) Product Portfolios and Specifications
 - 13.1.3 Teledyne FLIR Targeting Pods (TGP) Sales, Revenue, Price and Gross Margin (2021-2026)
 - 13.1.4 Teledyne FLIR Main Business Overview
 - 13.1.5 Teledyne FLIR Latest Developments
- 13.2 Hensoldt
 - 13.2.1 Hensoldt Company Information
 - 13.2.2 Hensoldt Targeting Pods (TGP) Product Portfolios and Specifications

13.2.3 Hensoldt Targeting Pods (TGP) Sales, Revenue, Price and Gross Margin (2021-2026)

13.2.4 Hensoldt Main Business Overview

13.2.5 Hensoldt Latest Developments

13.3 AVIC Jonhon Optronic Technology

13.3.1 AVIC Jonhon Optronic Technology Company Information

13.3.2 AVIC Jonhon Optronic Technology Targeting Pods (TGP) Product Portfolios and Specifications

13.3.3 AVIC Jonhon Optronic Technology Targeting Pods (TGP) Sales, Revenue, Price and Gross Margin (2021-2026)

13.3.4 AVIC Jonhon Optronic Technology Main Business Overview

13.3.5 AVIC Jonhon Optronic Technology Latest Developments

13.4 Lockheed Martin

13.4.1 Lockheed Martin Company Information

13.4.2 Lockheed Martin Targeting Pods (TGP) Product Portfolios and Specifications

13.4.3 Lockheed Martin Targeting Pods (TGP) Sales, Revenue, Price and Gross Margin (2021-2026)

13.4.4 Lockheed Martin Main Business Overview

13.4.5 Lockheed Martin Latest Developments

13.5 Thales

13.5.1 Thales Company Information

13.5.2 Thales Targeting Pods (TGP) Product Portfolios and Specifications

13.5.3 Thales Targeting Pods (TGP) Sales, Revenue, Price and Gross Margin (2021-2026)

13.5.4 Thales Main Business Overview

13.5.5 Thales Latest Developments

13.6 Rafael Advanced Defense Systems Ltd.

13.6.1 Rafael Advanced Defense Systems Ltd. Company Information

13.6.2 Rafael Advanced Defense Systems Ltd. Targeting Pods (TGP) Product Portfolios and Specifications

13.6.3 Rafael Advanced Defense Systems Ltd. Targeting Pods (TGP) Sales, Revenue, Price and Gross Margin (2021-2026)

13.6.4 Rafael Advanced Defense Systems Ltd. Main Business Overview

13.6.5 Rafael Advanced Defense Systems Ltd. Latest Developments

13.7 Northrop Grumman

13.7.1 Northrop Grumman Company Information

13.7.2 Northrop Grumman Targeting Pods (TGP) Product Portfolios and Specifications

13.7.3 Northrop Grumman Targeting Pods (TGP) Sales, Revenue, Price and Gross Margin (2021-2026)

- 13.7.4 Northrop Grumman Main Business Overview
- 13.7.5 Northrop Grumman Latest Developments
- 13.8 Elbit Systems
 - 13.8.1 Elbit Systems Company Information
 - 13.8.2 Elbit Systems Targeting Pods (TGP) Product Portfolios and Specifications
 - 13.8.3 Elbit Systems Targeting Pods (TGP) Sales, Revenue, Price and Gross Margin (2021-2026)
 - 13.8.4 Elbit Systems Main Business Overview
 - 13.8.5 Elbit Systems Latest Developments
- 13.9 BAE Systems
 - 13.9.1 BAE Systems Company Information
 - 13.9.2 BAE Systems Targeting Pods (TGP) Product Portfolios and Specifications
 - 13.9.3 BAE Systems Targeting Pods (TGP) Sales, Revenue, Price and Gross Margin (2021-2026)
 - 13.9.4 BAE Systems Main Business Overview
 - 13.9.5 BAE Systems Latest Developments
- 13.10 Leonardo
 - 13.10.1 Leonardo Company Information
 - 13.10.2 Leonardo Targeting Pods (TGP) Product Portfolios and Specifications
 - 13.10.3 Leonardo Targeting Pods (TGP) Sales, Revenue, Price and Gross Margin (2021-2026)
 - 13.10.4 Leonardo Main Business Overview
 - 13.10.5 Leonardo Latest Developments
- 13.11 Safran
 - 13.11.1 Safran Company Information
 - 13.11.2 Safran Targeting Pods (TGP) Product Portfolios and Specifications
 - 13.11.3 Safran Targeting Pods (TGP) Sales, Revenue, Price and Gross Margin (2021-2026)
 - 13.11.4 Safran Main Business Overview
 - 13.11.5 Safran Latest Developments
- 13.12 Israel Aerospace Industries
 - 13.12.1 Israel Aerospace Industries Company Information
 - 13.12.2 Israel Aerospace Industries Targeting Pods (TGP) Product Portfolios and Specifications
 - 13.12.3 Israel Aerospace Industries Targeting Pods (TGP) Sales, Revenue, Price and Gross Margin (2021-2026)
 - 13.12.4 Israel Aerospace Industries Main Business Overview
 - 13.12.5 Israel Aerospace Industries Latest Developments
- 13.13 Aselsan

- 13.13.1 Aselsan Company Information
- 13.13.2 Aselsan Targeting Pods (TGP) Product Portfolios and Specifications
- 13.13.3 Aselsan Targeting Pods (TGP) Sales, Revenue, Price and Gross Margin (2021-2026)
- 13.13.4 Aselsan Main Business Overview
- 13.13.5 Aselsan Latest Developments
- 13.14 Elcarim Optronic
 - 13.14.1 Elcarim Optronic Company Information
 - 13.14.2 Elcarim Optronic Targeting Pods (TGP) Product Portfolios and Specifications
 - 13.14.3 Elcarim Optronic Targeting Pods (TGP) Sales, Revenue, Price and Gross Margin (2021-2026)
 - 13.14.4 Elcarim Optronic Main Business Overview
 - 13.14.5 Elcarim Optronic Latest Developments
- 13.15 Resonon Inc
 - 13.15.1 Resonon Inc Company Information
 - 13.15.2 Resonon Inc Targeting Pods (TGP) Product Portfolios and Specifications
 - 13.15.3 Resonon Inc Targeting Pods (TGP) Sales, Revenue, Price and Gross Margin (2021-2026)
 - 13.15.4 Resonon Inc Main Business Overview
 - 13.15.5 Resonon Inc Latest Developments
- 13.16 Headwall Photonics
 - 13.16.1 Headwall Photonics Company Information
 - 13.16.2 Headwall Photonics Targeting Pods (TGP) Product Portfolios and Specifications
 - 13.16.3 Headwall Photonics Targeting Pods (TGP) Sales, Revenue, Price and Gross Margin (2021-2026)
 - 13.16.4 Headwall Photonics Main Business Overview
 - 13.16.5 Headwall Photonics Latest Developments
- 13.17 Wuhan JOHO Technology
 - 13.17.1 Wuhan JOHO Technology Company Information
 - 13.17.2 Wuhan JOHO Technology Targeting Pods (TGP) Product Portfolios and Specifications
 - 13.17.3 Wuhan JOHO Technology Targeting Pods (TGP) Sales, Revenue, Price and Gross Margin (2021-2026)
 - 13.17.4 Wuhan JOHO Technology Main Business Overview
 - 13.17.5 Wuhan JOHO Technology Latest Developments
- 13.18 Changchun Tongshi Optoelectronic Technology
 - 13.18.1 Changchun Tongshi Optoelectronic Technology Company Information
 - 13.18.2 Changchun Tongshi Optoelectronic Technology Targeting Pods (TGP)

Product Portfolios and Specifications

13.18.3 Changchun Tongshi Optoelectronic Technology Targeting Pods (TGP) Sales, Revenue, Price and Gross Margin (2021-2026)

13.18.4 Changchun Tongshi Optoelectronic Technology Main Business Overview

13.18.5 Changchun Tongshi Optoelectronic Technology Latest Developments

13.19 Beijing StarNeto Technology

13.19.1 Beijing StarNeto Technology Company Information

13.19.2 Beijing StarNeto Technology Targeting Pods (TGP) Product Portfolios and Specifications

13.19.3 Beijing StarNeto Technology Targeting Pods (TGP) Sales, Revenue, Price and Gross Margin (2021-2026)

13.19.4 Beijing StarNeto Technology Main Business Overview

13.19.5 Beijing StarNeto Technology Latest Developments

14 RESEARCH FINDINGS AND CONCLUSION

List Of Tables

LIST OF TABLES

Table 1. Targeting Pods (TGP) Annual Sales CAGR by Geographic Region (2021, 2025 & 2032) & (\$ millions)

Table 2. Targeting Pods (TGP) Annual Sales CAGR by Country/Region (2021, 2025 & 2032) & (\$ millions)

Table 3. Major Players of Multispectral

Table 4. Major Players of Hyperspectral

Table 5. Global Targeting Pods (TGP) Sales by Type (2021-2026) & (Units)

Table 6. Global Targeting Pods (TGP) Sales Market Share by Type (2021-2026)

Table 7. Global Targeting Pods (TGP) Revenue by Type (2021-2026) & (\$ million)

Table 8. Global Targeting Pods (TGP) Revenue Market Share by Type (2021-2026)

Table 9. Global Targeting Pods (TGP) Sale Price by Type (2021-2026) & (K US\$/Unit)

Table 10. Major Players of Small Optoelectronic Pods

Table 11. Major Players of Medium Optoelectronic Pods

Table 12. Major Players of Large Optoelectronic Pods

Table 13. Global Targeting Pods (TGP) Sales by Specifications (2021-2026) & (Units)

Table 14. Global Targeting Pods (TGP) Sales Market Share by Specifications (2021-2026)

Table 15. Global Targeting Pods (TGP) Revenue by Specifications (2021-2026) & (\$ million)

Table 16. Global Targeting Pods (TGP) Revenue Market Share by Specifications (2021-2026)

Table 17. Global Targeting Pods (TGP) Sale Price by Specifications (2021-2026) & (K US\$/Unit)

Table 18. Major Players of 2-axis Stabilized Gimbals

Table 19. Major Players of 3-axis Stabilized Gimbals

Table 20. Major Players of 4-axis Stabilized Gimbals

Table 21. Global Targeting Pods (TGP) Sales by Stabilization Architecture (2021-2026) & (Units)

Table 22. Global Targeting Pods (TGP) Sales Market Share by Stabilization Architecture (2021-2026)

Table 23. Global Targeting Pods (TGP) Revenue by Stabilization Architecture (2021-2026) & (\$ million)

Table 24. Global Targeting Pods (TGP) Revenue Market Share by Stabilization Architecture (2021-2026)

Table 25. Global Targeting Pods (TGP) Sale Price by Stabilization Architecture

(2021-2026) & (K US\$/Unit)

Table 26. Global Targeting Pods (TGP) Sale by Application (2021-2026) & (Units)

Table 27. Global Targeting Pods (TGP) Sale Market Share by Application (2021-2026)

Table 28. Global Targeting Pods (TGP) Revenue by Application (2021-2026) & (\$ million)

Table 29. Global Targeting Pods (TGP) Revenue Market Share by Application (2021-2026)

Table 30. Global Targeting Pods (TGP) Sale Price by Application (2021-2026) & (K US\$/Unit)

Table 31. Global Targeting Pods (TGP) Sales by Company (2021-2026) & (Units)

Table 32. Global Targeting Pods (TGP) Sales Market Share by Company (2021-2026)

Table 33. Global Targeting Pods (TGP) Revenue by Company (2021-2026) & (\$ millions)

Table 34. Global Targeting Pods (TGP) Revenue Market Share by Company (2021-2026)

Table 35. Global Targeting Pods (TGP) Sale Price by Company (2021-2026) & (K US\$/Unit)

Table 36. Key Manufacturers Targeting Pods (TGP) Producing Area Distribution and Sales Area

Table 37. Players Targeting Pods (TGP) Products Offered

Table 38. Targeting Pods (TGP) Concentration Ratio (CR3, CR5 and CR10) & (2024-2026)

Table 39. New Products and Potential Entrants

Table 40. Market M&A Activity & Strategy

Table 41. Global Targeting Pods (TGP) Sales by Geographic Region (2021-2026) & (Units)

Table 42. Global Targeting Pods (TGP) Sales Market Share Geographic Region (2021-2026)

Table 43. Global Targeting Pods (TGP) Revenue by Geographic Region (2021-2026) & (\$ millions)

Table 44. Global Targeting Pods (TGP) Revenue Market Share by Geographic Region (2021-2026)

Table 45. Global Targeting Pods (TGP) Sales by Country/Region (2021-2026) & (Units)

Table 46. Global Targeting Pods (TGP) Sales Market Share by Country/Region (2021-2026)

Table 47. Global Targeting Pods (TGP) Revenue by Country/Region (2021-2026) & (\$ millions)

Table 48. Global Targeting Pods (TGP) Revenue Market Share by Country/Region (2021-2026)

Table 49. Americas Targeting Pods (TGP) Sales by Country (2021-2026) & (Units)
Table 50. Americas Targeting Pods (TGP) Sales Market Share by Country (2021-2026)
Table 51. Americas Targeting Pods (TGP) Revenue by Country (2021-2026) & (\$ millions)
Table 52. Americas Targeting Pods (TGP) Sales by Type (2021-2026) & (Units)
Table 53. Americas Targeting Pods (TGP) Sales by Application (2021-2026) & (Units)
Table 54. APAC Targeting Pods (TGP) Sales by Region (2021-2026) & (Units)
Table 55. APAC Targeting Pods (TGP) Sales Market Share by Region (2021-2026)
Table 56. APAC Targeting Pods (TGP) Revenue by Region (2021-2026) & (\$ millions)
Table 57. APAC Targeting Pods (TGP) Sales by Type (2021-2026) & (Units)
Table 58. APAC Targeting Pods (TGP) Sales by Application (2021-2026) & (Units)
Table 59. Europe Targeting Pods (TGP) Sales by Country (2021-2026) & (Units)
Table 60. Europe Targeting Pods (TGP) Revenue by Country (2021-2026) & (\$ millions)
Table 61. Europe Targeting Pods (TGP) Sales by Type (2021-2026) & (Units)
Table 62. Europe Targeting Pods (TGP) Sales by Application (2021-2026) & (Units)
Table 63. Middle East & Africa Targeting Pods (TGP) Sales by Country (2021-2026) & (Units)
Table 64. Middle East & Africa Targeting Pods (TGP) Revenue Market Share by Country (2021-2026)
Table 65. Middle East & Africa Targeting Pods (TGP) Sales by Type (2021-2026) & (Units)
Table 66. Middle East & Africa Targeting Pods (TGP) Sales by Application (2021-2026) & (Units)
Table 67. Key Market Drivers & Growth Opportunities of Targeting Pods (TGP)
Table 68. Key Market Challenges & Risks of Targeting Pods (TGP)
Table 69. Key Industry Trends of Targeting Pods (TGP)
Table 70. Targeting Pods (TGP) Raw Material
Table 71. Key Suppliers of Raw Materials
Table 72. Targeting Pods (TGP) Distributors List
Table 73. Targeting Pods (TGP) Customer List
Table 74. Global Targeting Pods (TGP) Sales Forecast by Region (2027-2032) & (Units)
Table 75. Global Targeting Pods (TGP) Revenue Forecast by Region (2027-2032) & (\$ millions)
Table 76. Americas Targeting Pods (TGP) Sales Forecast by Country (2027-2032) & (Units)
Table 77. Americas Targeting Pods (TGP) Annual Revenue Forecast by Country (2027-2032) & (\$ millions)
Table 78. APAC Targeting Pods (TGP) Sales Forecast by Region (2027-2032) & (Units)

Table 79. APAC Targeting Pods (TGP) Annual Revenue Forecast by Region (2027-2032) & (\$ millions)
Table 80. Europe Targeting Pods (TGP) Sales Forecast by Country (2027-2032) & (Units)
Table 81. Europe Targeting Pods (TGP) Revenue Forecast by Country (2027-2032) & (\$ millions)
Table 82. Middle East & Africa Targeting Pods (TGP) Sales Forecast by Country (2027-2032) & (Units)
Table 83. Middle East & Africa Targeting Pods (TGP) Revenue Forecast by Country (2027-2032) & (\$ millions)
Table 84. Global Targeting Pods (TGP) Sales Forecast by Type (2027-2032) & (Units)
Table 85. Global Targeting Pods (TGP) Revenue Forecast by Type (2027-2032) & (\$ millions)
Table 86. Global Targeting Pods (TGP) Sales Forecast by Application (2027-2032) & (Units)
Table 87. Global Targeting Pods (TGP) Revenue Forecast by Application (2027-2032) & (\$ millions)
Table 88. Teledyne FLIR Basic Information, Targeting Pods (TGP) Manufacturing Base, Sales Area and Its Competitors
Table 89. Teledyne FLIR Targeting Pods (TGP) Product Portfolios and Specifications
Table 90. Teledyne FLIR Targeting Pods (TGP) Sales (Units), Revenue (\$ Million), Price (K US\$/Unit) and Gross Margin (2021-2026)
Table 91. Teledyne FLIR Main Business
Table 92. Teledyne FLIR Latest Developments
Table 93. Hensoldt Basic Information, Targeting Pods (TGP) Manufacturing Base, Sales Area and Its Competitors
Table 94. Hensoldt Targeting Pods (TGP) Product Portfolios and Specifications
Table 95. Hensoldt Targeting Pods (TGP) Sales (Units), Revenue (\$ Million), Price (K US\$/Unit) and Gross Margin (2021-2026)
Table 96. Hensoldt Main Business
Table 97. Hensoldt Latest Developments
Table 98. AVIC Jonhon Optron Technology Basic Information, Targeting Pods (TGP) Manufacturing Base, Sales Area and Its Competitors
Table 99. AVIC Jonhon Optron Technology Targeting Pods (TGP) Product Portfolios and Specifications
Table 100. AVIC Jonhon Optron Technology Targeting Pods (TGP) Sales (Units), Revenue (\$ Million), Price (K US\$/Unit) and Gross Margin (2021-2026)
Table 101. AVIC Jonhon Optron Technology Main Business
Table 102. AVIC Jonhon Optron Technology Latest Developments

Table 103. Lockheed Martin Basic Information, Targeting Pods (TGP) Manufacturing Base, Sales Area and Its Competitors

Table 104. Lockheed Martin Targeting Pods (TGP) Product Portfolios and Specifications

Table 105. Lockheed Martin Targeting Pods (TGP) Sales (Units), Revenue (\$ Million), Price (K US\$/Unit) and Gross Margin (2021-2026)

Table 106. Lockheed Martin Main Business

Table 107. Lockheed Martin Latest Developments

Table 108. Thales Basic Information, Targeting Pods (TGP) Manufacturing Base, Sales Area and Its Competitors

Table 109. Thales Targeting Pods (TGP) Product Portfolios and Specifications

Table 110. Thales Targeting Pods (TGP) Sales (Units), Revenue (\$ Million), Price (K US\$/Unit) and Gross Margin (2021-2026)

Table 111. Thales Main Business

Table 112. Thales Latest Developments

Table 113. Rafael Advanced Defense Systems Ltd. Basic Information, Targeting Pods (TGP) Manufacturing Base, Sales Area and Its Competitors

Table 114. Rafael Advanced Defense Systems Ltd. Targeting Pods (TGP) Product Portfolios and Specifications

Table 115. Rafael Advanced Defense Systems Ltd. Targeting Pods (TGP) Sales (Units), Revenue (\$ Million), Price (K US\$/Unit) and Gross Margin (2021-2026)

Table 116. Rafael Advanced Defense Systems Ltd. Main Business

Table 117. Rafael Advanced Defense Systems Ltd. Latest Developments

Table 118. Northrop Grumman Basic Information, Targeting Pods (TGP) Manufacturing Base, Sales Area and Its Competitors

Table 119. Northrop Grumman Targeting Pods (TGP) Product Portfolios and Specifications

Table 120. Northrop Grumman Targeting Pods (TGP) Sales (Units), Revenue (\$ Million), Price (K US\$/Unit) and Gross Margin (2021-2026)

Table 121. Northrop Grumman Main Business

Table 122. Northrop Grumman Latest Developments

Table 123. Elbit Systems Basic Information, Targeting Pods (TGP) Manufacturing Base, Sales Area and Its Competitors

Table 124. Elbit Systems Targeting Pods (TGP) Product Portfolios and Specifications

Table 125. Elbit Systems Targeting Pods (TGP) Sales (Units), Revenue (\$ Million), Price (K US\$/Unit) and Gross Margin (2021-2026)

Table 126. Elbit Systems Main Business

Table 127. Elbit Systems Latest Developments

Table 128. BAE Systems Basic Information, Targeting Pods (TGP) Manufacturing Base,

Sales Area and Its Competitors

Table 129. BAE Systems Targeting Pods (TGP) Product Portfolios and Specifications

Table 130. BAE Systems Targeting Pods (TGP) Sales (Units), Revenue (\$ Million), Price (K US\$/Unit) and Gross Margin (2021-2026)

Table 131. BAE Systems Main Business

Table 132. BAE Systems Latest Developments

Table 133. Leonardo Basic Information, Targeting Pods (TGP) Manufacturing Base, Sales Area and Its Competitors

Table 134. Leonardo Targeting Pods (TGP) Product Portfolios and Specifications

Table 135. Leonardo Targeting Pods (TGP) Sales (Units), Revenue (\$ Million), Price (K US\$/Unit) and Gross Margin (2021-2026)

Table 136. Leonardo Main Business

Table 137. Leonardo Latest Developments

Table 138. Safran Basic Information, Targeting Pods (TGP) Manufacturing Base, Sales Area and Its Competitors

Table 139. Safran Targeting Pods (TGP) Product Portfolios and Specifications

Table 140. Safran Targeting Pods (TGP) Sales (Units), Revenue (\$ Million), Price (K US\$/Unit) and Gross Margin (2021-2026)

Table 141. Safran Main Business

Table 142. Safran Latest Developments

Table 143. Israel Aerospace Industries Basic Information, Targeting Pods (TGP) Manufacturing Base, Sales Area and Its Competitors

Table 144. Israel Aerospace Industries Targeting Pods (TGP) Product Portfolios and Specifications

Table 145. Israel Aerospace Industries Targeting Pods (TGP) Sales (Units), Revenue (\$ Million), Price (K US\$/Unit) and Gross Margin (2021-2026)

Table 146. Israel Aerospace Industries Main Business

Table 147. Israel Aerospace Industries Latest Developments

Table 148. Aselsan Basic Information, Targeting Pods (TGP) Manufacturing Base, Sales Area and Its Competitors

Table 149. Aselsan Targeting Pods (TGP) Product Portfolios and Specifications

Table 150. Aselsan Targeting Pods (TGP) Sales (Units), Revenue (\$ Million), Price (K US\$/Unit) and Gross Margin (2021-2026)

Table 151. Aselsan Main Business

Table 152. Aselsan Latest Developments

Table 153. Elcarim Optronics Basic Information, Targeting Pods (TGP) Manufacturing Base, Sales Area and Its Competitors

Table 154. Elcarim Optronics Targeting Pods (TGP) Product Portfolios and Specifications

Table 155. Elcarim Optronic Targeting Pods (TGP) Sales (Units), Revenue (\$ Million), Price (K US\$/Unit) and Gross Margin (2021-2026)

Table 156. Elcarim Optronic Main Business

Table 157. Elcarim Optronic Latest Developments

Table 158. Resonon Inc Basic Information, Targeting Pods (TGP) Manufacturing Base, Sales Area and Its Competitors

Table 159. Resonon Inc Targeting Pods (TGP) Product Portfolios and Specifications

Table 160. Resonon Inc Targeting Pods (TGP) Sales (Units), Revenue (\$ Million), Price (K US\$/Unit) and Gross Margin (2021-2026)

Table 161. Resonon Inc Main Business

Table 162. Resonon Inc Latest Developments

Table 163. Headwall Photonics Basic Information, Targeting Pods (TGP) Manufacturing Base, Sales Area and Its Competitors

Table 164. Headwall Photonics Targeting Pods (TGP) Product Portfolios and Specifications

Table 165. Headwall Photonics Targeting Pods (TGP) Sales (Units), Revenue (\$ Million), Price (K US\$/Unit) and Gross Margin (2021-2026)

Table 166. Headwall Photonics Main Business

Table 167. Headwall Photonics Latest Developments

Table 168. Wuhan JOHO Technology Basic Information, Targeting Pods (TGP) Manufacturing Base, Sales Area and Its Competitors

Table 169. Wuhan JOHO Technology Targeting Pods (TGP) Product Portfolios and Specifications

Table 170. Wuhan JOHO Technology Targeting Pods (TGP) Sales (Units), Revenue (\$ Million), Price (K US\$/Unit) and Gross Margin (2021-2026)

Table 171. Wuhan JOHO Technology Main Business

Table 172. Wuhan JOHO Technology Latest Developments

Table 173. Changchun Tongshi Optoelectronic Technology Basic Information, Targeting Pods (TGP) Manufacturing Base, Sales Area and Its Competitors

Table 174. Changchun Tongshi Optoelectronic Technology Targeting Pods (TGP) Product Portfolios and Specifications

Table 175. Changchun Tongshi Optoelectronic Technology Targeting Pods (TGP) Sales (Units), Revenue (\$ Million), Price (K US\$/Unit) and Gross Margin (2021-2026)

Table 176. Changchun Tongshi Optoelectronic Technology Main Business

Table 177. Changchun Tongshi Optoelectronic Technology Latest Developments

Table 178. Beijing StarNeto Technology Basic Information, Targeting Pods (TGP) Manufacturing Base, Sales Area and Its Competitors

Table 179. Beijing StarNeto Technology Targeting Pods (TGP) Product Portfolios and Specifications

Table 180. Beijing StarNeto Technology Targeting Pods (TGP) Sales (Units), Revenue (\$ Million), Price (K US\$/Unit) and Gross Margin (2021-2026)

Table 181. Beijing StarNeto Technology Main Business

Table 182. Beijing StarNeto Technology Latest Developments

List Of Figures

LIST OF FIGURES

- Figure 1. Picture of Targeting Pods (TGP)
- Figure 2. Targeting Pods (TGP) Report Years Considered
- Figure 3. Research Objectives
- Figure 4. Research Methodology
- Figure 5. Research Process and Data Source
- Figure 6. Global Targeting Pods (TGP) Sales Growth Rate 2021-2032 (Units)
- Figure 7. Global Targeting Pods (TGP) Revenue Growth Rate 2021-2032 (\$ millions)
- Figure 8. Targeting Pods (TGP) Sales by Geographic Region (2021, 2025 & 2032) & (\$ millions)
- Figure 9. Targeting Pods (TGP) Sales Market Share by Country/Region (2025)
- Figure 10. Targeting Pods (TGP) Sales Market Share by Country/Region (2021, 2025 & 2032)
- Figure 11. Product Picture of Multispectral
- Figure 12. Product Picture of Hyperspectral
- Figure 13. Global Targeting Pods (TGP) Sales Market Share by Type in 2026
- Figure 14. Global Targeting Pods (TGP) Revenue Market Share by Type (2021-2026)
- Figure 15. Product Picture of Small Optoelectronic Pods
- Figure 16. Product Picture of Medium Optoelectronic Pods
- Figure 17. Product Picture of Large Optoelectronic Pods
- Figure 18. Global Targeting Pods (TGP) Sales Market Share by Specifications in 2026
- Figure 19. Global Targeting Pods (TGP) Revenue Market Share by Specifications (2021-2026)
- Figure 20. Product Picture of 2-axis Stabilized Gimbals
- Figure 21. Product Picture of 3-axis Stabilized Gimbals
- Figure 22. Product Picture of 4-axis Stabilized Gimbals
- Figure 23. Global Targeting Pods (TGP) Sales Market Share by Stabilization Architecture in 2026
- Figure 24. Global Targeting Pods (TGP) Revenue Market Share by Stabilization Architecture (2021-2026)
- Figure 25. Targeting Pods (TGP) Consumed in National Defense
- Figure 26. Global Targeting Pods (TGP) Market: National Defense (2021-2026) & (Units)
- Figure 27. Targeting Pods (TGP) Consumed in Air Traffic
- Figure 28. Global Targeting Pods (TGP) Market: Air Traffic (2021-2026) & (Units)
- Figure 29. Targeting Pods (TGP) Consumed in Drone Industry

- Figure 30. Global Targeting Pods (TGP) Market: Drone Industry (2021-2026) & (Units)
- Figure 31. Targeting Pods (TGP) Consumed in Others
- Figure 32. Global Targeting Pods (TGP) Market: Others (2021-2026) & (Units)
- Figure 33. Global Targeting Pods (TGP) Sale Market Share by Application (2025)
- Figure 34. Global Targeting Pods (TGP) Revenue Market Share by Application in 2025
- Figure 35. Targeting Pods (TGP) Sales by Company in 2025 (Units)
- Figure 36. Global Targeting Pods (TGP) Sales Market Share by Company in 2025
- Figure 37. Targeting Pods (TGP) Revenue by Company in 2025 (\$ millions)
- Figure 38. Global Targeting Pods (TGP) Revenue Market Share by Company in 2025
- Figure 39. Global Targeting Pods (TGP) Sales Market Share by Geographic Region (2021-2026)
- Figure 40. Global Targeting Pods (TGP) Revenue Market Share by Geographic Region in 2025
- Figure 41. Americas Targeting Pods (TGP) Sales 2021-2026 (Units)
- Figure 42. Americas Targeting Pods (TGP) Revenue 2021-2026 (\$ millions)
- Figure 43. APAC Targeting Pods (TGP) Sales 2021-2026 (Units)
- Figure 44. APAC Targeting Pods (TGP) Revenue 2021-2026 (\$ millions)
- Figure 45. Europe Targeting Pods (TGP) Sales 2021-2026 (Units)
- Figure 46. Europe Targeting Pods (TGP) Revenue 2021-2026 (\$ millions)
- Figure 47. Middle East & Africa Targeting Pods (TGP) Sales 2021-2026 (Units)
- Figure 48. Middle East & Africa Targeting Pods (TGP) Revenue 2021-2026 (\$ millions)
- Figure 49. Americas Targeting Pods (TGP) Sales Market Share by Country in 2025
- Figure 50. Americas Targeting Pods (TGP) Revenue Market Share by Country (2021-2026)
- Figure 51. Americas Targeting Pods (TGP) Sales Market Share by Type (2021-2026)
- Figure 52. Americas Targeting Pods (TGP) Sales Market Share by Application (2021-2026)
- Figure 53. United States Targeting Pods (TGP) Revenue Growth 2021-2026 (\$ millions)
- Figure 54. Canada Targeting Pods (TGP) Revenue Growth 2021-2026 (\$ millions)
- Figure 55. Mexico Targeting Pods (TGP) Revenue Growth 2021-2026 (\$ millions)
- Figure 56. Brazil Targeting Pods (TGP) Revenue Growth 2021-2026 (\$ millions)
- Figure 57. APAC Targeting Pods (TGP) Sales Market Share by Region in 2025
- Figure 58. APAC Targeting Pods (TGP) Revenue Market Share by Region (2021-2026)
- Figure 59. APAC Targeting Pods (TGP) Sales Market Share by Type (2021-2026)
- Figure 60. APAC Targeting Pods (TGP) Sales Market Share by Application (2021-2026)
- Figure 61. China Targeting Pods (TGP) Revenue Growth 2021-2026 (\$ millions)
- Figure 62. Japan Targeting Pods (TGP) Revenue Growth 2021-2026 (\$ millions)
- Figure 63. South Korea Targeting Pods (TGP) Revenue Growth 2021-2026 (\$ millions)
- Figure 64. Southeast Asia Targeting Pods (TGP) Revenue Growth 2021-2026 (\$

millions)

Figure 65. India Targeting Pods (TGP) Revenue Growth 2021-2026 (\$ millions)

Figure 66. Australia Targeting Pods (TGP) Revenue Growth 2021-2026 (\$ millions)

Figure 67. China Taiwan Targeting Pods (TGP) Revenue Growth 2021-2026 (\$ millions)

Figure 68. Europe Targeting Pods (TGP) Sales Market Share by Country in 2025

Figure 69. Europe Targeting Pods (TGP) Revenue Market Share by Country
(2021-2026)

Figure 70. Europe Targeting Pods (TGP) Sales Market Share by Type (2021-2026)

Figure 71. Europe Targeting Pods (TGP) Sales Market Share by Application
(2021-2026)

Figure 72. Germany Targeting Pods (TGP) Revenue Growth 2021-2026 (\$ millions)

Figure 73. France Targeting Pods (TGP) Revenue Growth 2021-2026 (\$ millions)

Figure 74. UK Targeting Pods (TGP) Revenue Growth 2021-2026 (\$ millions)

Figure 75. Italy Targeting Pods (TGP) Revenue Growth 2021-2026 (\$ millions)

Figure 76. Russia Targeting Pods (TGP) Revenue Growth 2021-2026 (\$ millions)

Figure 77. Middle East & Africa Targeting Pods (TGP) Sales Market Share by Country
(2021-2026)

Figure 78. Middle East & Africa Targeting Pods (TGP) Sales Market Share by Type
(2021-2026)

Figure 79. Middle East & Africa Targeting Pods (TGP) Sales Market Share by
Application (2021-2026)

Figure 80. Egypt Targeting Pods (TGP) Revenue Growth 2021-2026 (\$ millions)

Figure 81. South Africa Targeting Pods (TGP) Revenue Growth 2021-2026 (\$ millions)

Figure 82. Israel Targeting Pods (TGP) Revenue Growth 2021-2026 (\$ millions)

Figure 83. Turkey Targeting Pods (TGP) Revenue Growth 2021-2026 (\$ millions)

Figure 84. GCC Countries Targeting Pods (TGP) Revenue Growth 2021-2026 (\$
millions)

Figure 85. Manufacturing Cost Structure Analysis of Targeting Pods (TGP) in 2026

Figure 86. Manufacturing Process Analysis of Targeting Pods (TGP)

Figure 87. Industry Chain Structure of Targeting Pods (TGP)

Figure 88. Channels of Distribution

Figure 89. Global Targeting Pods (TGP) Sales Market Forecast by Region (2027-2032)

Figure 90. Global Targeting Pods (TGP) Revenue Market Share Forecast by Region
(2027-2032)

Figure 91. Global Targeting Pods (TGP) Sales Market Share Forecast by Type
(2027-2032)

Figure 92. Global Targeting Pods (TGP) Revenue Market Share Forecast by Type
(2027-2032)

Figure 93. Global Targeting Pods (TGP) Sales Market Share Forecast by Application

(2027-2032)

Figure 94. Global Targeting Pods (TGP) Revenue Market Share Forecast by Application
(2027-2032)

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