

Counter-UAS Systems Market by Solution (Drone Detection, Tracking & Identification, C2, UAS Mitigation & Neutralization), by End-User (Commercial, Defense, Government & Law Enforcement), Deployment, Range, Technology and Region - Global Forecast to 2030

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Abstracts

The counter-unmanned air systems (C-UAS) market is estimated to be USD 6.64 billion in 2025. It is projected to reach USD 20.31 billion by 2030, at a CAGR of 25.1%. The need for radar systems, RF sensors, and command-and-control units to counter drone threats accelerates market growth. Defense modernization efforts and the demand for secure, high-speed data and power transmission in contested airspace remain key growth drivers. C4ISR integrations, electronic warfare systems, and counter-drone solutions within multi-layer defense frameworks further advance the adoption of compact, high-performance systems. Increasing global defense budgets and rising investments in AI-enabled threat detection and autonomous engagement technologies reinforce the demand for ruggedized and miniaturized solutions to ensure reliable performance across multi-domain C-UAS operations.

“The conventional segment is projected to account for a larger share than the AI-powered segment in the counter-unmanned air systems (C-UAS) market during the forecast period.”

By technology, the conventional segment is projected to account for a larger share than the AI-powered segment in the counter-unmanned air systems (C-UAS) market during the forecast period. The segment’s growth is due to conventional systems being widely deployed across the defense and government sectors for perimeter protection, base

security, and border surveillance. They combine radar, EO/IR sensors, and RF jammers in field-proven architectures, offering reliability and ease of integration. Defense agencies prefer conventional C-UAS units due to their cost-effectiveness, scalability, and compatibility with existing command-and-control infrastructures, sustaining their market dominance over the forecast period.

“The handheld segment is projected to be the faster-growing segment than the ground-based segment in the counter-unmanned air systems (C-UAS) market during the forecast period.”

By deployment, the handheld segment is projected to be the faster-growing segment than the ground-based segment during the forecast period. This projection can be attributed to the increasing demand for handheld systems from law enforcement, border patrol units, and security agencies for portable, easy-to-operate anti-drone solutions. These lightweight jamming guns and portable RF disruptors allow rapid response during drone incursions in urban and tactical environments. Their operational flexibility, low cost, and growing adoption of public safety and event protection are accelerating their deployment worldwide.

“North America is projected to be the fastest-growing market in the counter-unmanned air systems (C-UAS) market during the forecast period.”

North America is projected to be the fastest-growing market in the counter-unmanned air systems (C-UAS) market, driven by substantial government investments in counter-drone R&D programs, rising threat levels from unauthorized UAVs, and frequent trials under the US Department of Defense and Department of Homeland Security. The region hosts several leading C-UAS manufacturers and integrators developing AI-enabled detection and directed-energy solutions. Moreover, the growing civil adoption of C-UAS systems across airports, power plants, and critical infrastructure further supports regional market expansion.

Breakdown of Primaries

The study contains insights from various industry experts, from component suppliers to Tier 1 companies and OEMs. The break-up of the primaries is as follows:

By Company Type: Tier 1 – 40%; Tier 2 – 30%; and Tier 3 – 30%

By Designation: Directors – 20%; Managers – 10%; and Others – 70%

By Region: Asia Pacific – 40%; Europe – 20%; North America – 20%; Middle East – 10%; and Rest of the World – 10%

RTX (US), Lockheed Martin Corporation (US), Elbit Systems Ltd. (Israel), Northrop Grumman (US), and RAFAEL Advanced Defense Systems Ltd. (Israel) are some of the leading players operating in the counter-unmanned air systems (C-UAS) market.

Research Coverage

The study covers the counter-unmanned air systems (C-UAS) market across various segments and subsegments. It aims to estimate this market's size and growth potential across different segments based on solution, range, deployment, technology, end-user, and region. This study also includes an in-depth competitive analysis of the key players in the market, along with their company profiles, key observations related to their solutions and business offerings, recent developments undertaken by them, and key market strategies adopted by them.

Key Benefits of Buying this Report

This report will help the market leaders/new entrants with information on the closest approximations of the revenue numbers for the overall counter-unmanned air systems (C-UAS) market and its subsegments. The report covers the entire counter-unmanned air systems (C-UAS) market ecosystem. The report will help stakeholders understand the competitive landscape and gain more insights to position their businesses better and plan suitable go-to-market strategies. It will also help stakeholders understand the market's pulse and provide them with information on key market drivers, restraints, challenges, and opportunities.

The report provides insights into the following pointers:

Market Dynamics: Analysis of key growth drivers (Shift to integrated air and missile defense alignment, rising threat from drone swarms and asymmetric warfare, enterprise-grade C2/fusion replacing point solutions), restraints (legal authority and spectrum constraints in civil airspace and critical materials, critical materials and export-control dependencies), opportunities (IAMD-ready adapters and common-architecture compliance, scalable non-kinetic defeat systems), challenges (Proving effectiveness and safety of emerging effectors in-theater,

supply chain resilience for EO/IR, power electronics, and lasers)

Product Development: In-depth analysis of product innovation/development by companies across various regions

Market Development: Comprehensive information about lucrative markets across varied regions

Market Diversification: Exhaustive information about new solutions, untapped geographies, recent developments, and investments in the counter-unmanned air systems (C-UAS) market

Competitive Assessment: In-depth assessment of market share, growth strategies, and product offerings of leading players like market RTX (US), Lockheed Martin Corporation (US), Elbit Systems Ltd. (Israel), Northrop Grumman (US), and RAFAEL Advanced Defense Systems Ltd. (Israel) in the counter-unmanned air systems (C-UAS) market

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