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Electronic Warfare Market by Platform (Ground, Naval, Airborne, Space), Capability (Electronic Support, Electronic Attack, Electronic Protection), End-Use, Product (Electronic Warfare Equipment, Operational Support) and Region - Global Forecast to 2028

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Abstracts

The Electronic Warfare market is valued at USD 10.8 billion in 2023 and is projected to reach USD 19.4 billion by 2028, at a CAGR of 12.5% from 2023 to 2028. The electronic warfare (EW) market is undergoing rapid expansion, driven by the increasing complexity of the global security environment and the continuous evolution of threat spectrums. This growth is underpinned by significant technological advancements in electronic attack, protection, and support capabilities across air, land, naval, and space domains. Innovations in signal processing, stealth technologies, cyber warfare, and electromagnetic spectrum management are crucial in this expansion. The integration of artificial intelligence and machine learning for enhanced threat detection and response further propels market growth. Additionally, the demand for network-centric warfare and the demand for interoperable, multi-domain EW systems highlight the critical role of EW in modern military strategies, ensuring forces maintain a competitive edge in electronic dominance. This strategic priority reflects the importance of EW in countering advanced threats and protecting communication and information systems in contested environments.

“Based on end use, the OEM segment is estimated to have the second largest market share in 2023.”

The OEM (Original Equipment Manufacturer) segment, recognized as the second largest market within the electronic warfare sector, is driven by the demand for cutting-edge, integrated electronic warfare systems. This segment's growth is fueled by the

continuous need for modernization and enhancement of military platforms with advanced electronic warfare capabilities directly from the production phase. OEMs are increasingly focusing on the integration of sophisticated electronic warfare technologies, including advanced signal processing, electronic protection measures, and cyber-electronic systems, into new military assets. This strategic focus not only ensures that new platforms are equipped with the latest electronic warfare technologies but also enhances the overall effectiveness and survivability of these platforms in highly contested environments. The commitment to integrating state-of-the-art electronic warfare systems at the OEM level underscores the critical importance of electromagnetic spectrum dominance as a cornerstone of modern military strategy.

“Based on capability, the electronic attack segment is estimated to have the second largest market share in 2023.”

The electronic attack capability segment, as the second-largest market within the electronic warfare sector, is marked by its focus on offensive operations aimed at degrading, disrupting, or destroying adversary electronic systems. This segment's growth is propelled by the escalating need for advanced electronic warfare solutions that can effectively counter and neutralize a wide range of electronic threats, including sophisticated enemy radar and communication systems. Innovations in this domain are increasingly centered around the development of new jamming technologies, cyber-electronic tactics, and directed energy weapons that offer precise and effective electronic attack capabilities. These advancements are critical for achieving dominance in the electromagnetic spectrum, thereby enabling military forces to disrupt enemy operations while protecting friendly communications and sensor networks. The continuous evolution and enhancement of electronic attack technologies are essential for maintaining strategic advantages and operational readiness in the face of rapidly advancing electronic warfare threats and tactics.

“Based on Platform, the Naval segment is estimated to have the second-largest market share in 2023.”

The naval segment, as a platform within the electronic warfare market, is experiencing significant growth, driven by the strategic necessity to safeguard maritime assets and maintain superiority in maritime operational theaters. This growth is underscored by advancements in electronic attack, protection, and support capabilities tailored for naval forces. Investments are heavily focused on developing and integrating sophisticated electronic warfare systems on surface ships, submarines, and unmanned marine vehicles. These systems are designed to counter and neutralize a broad spectrum of electronic threats, including anti-ship missile systems, through advanced jamming techniques, electronic countermeasures, and signal interception capabilities. The emphasis on enhancing naval electronic warfare capabilities reflects the critical importance of electromagnetic spectrum dominance in ensuring the security and operational effectiveness of naval forces in increasingly contested and technologically advanced maritime environments.

“Based on regions, the Asia Pacific region is estimated to have the second largest market share in 2023.”

The Asia-Pacific electronic warfare market is rapidly growing, fueled by increased defense spending and a push for military modernization to address evolving security threats. The focus is on advancing electronic attack, protection, and support capabilities, with significant investments in jamming technologies, electronic countermeasures, and cyber-electronic operations. Countries in the region are also investing in research and development to incorporate cutting-edge technologies like directed energy weapons and advanced jammers. This drive aims to counter sophisticated threats and maintain dominance in electronic warfare, highlighting the strategic importance of technological superiority in modern and future conflicts.

The break-up of the profile of primary participants in the Electronic Warfare market:

By Company Type: Tier 1 – 35%, Tier 2 – 45%, and Tier 3 – 20%

By Designation: C Level – 35%, Director Level – 25%, and Others – 40%

By Region: North America – 45%, Europe – 20%, Asia Pacific – 30%, Middle East- 4%, Rest of the World (RoW) – 1%

Major companies profiled in the report include BAE System (UK), Raytheon Technologies Corporation (US), Northrop Grumman (US), L3Harris Technologies, Inc. (US), Lockheed Martin Corporation (US), Israel Aerospace Industries (Israel) and Elbit Systems (UK) among others.

Research Coverage:

This market study covers the Electronic Warfare market across various segments and subsegments. It aims to estimate this market's size and growth potential across different parts based on size, operational orbits, application, component, end user, and region. This study also includes an in-depth competitive analysis of the key players in the market, their company profiles, key observations related to their product and business offerings, recent developments, and key market strategies they adopted.

Reasons to buy this report:

The report will help the market leaders/new entrants with information on the closest approximations of the revenue numbers for the overall electronic warfare market. This report will help stakeholders understand the competitive landscape and gain more insights to position their businesses better and plan suitable go-to-market strategies. The report also helps stakeholders understand the market pulse and provides information on key market drivers, restraints, challenges, and opportunities. The electronic warfare market is experiencing substantial growth, primarily driven by the exchange of real-time information. The increasing trend toward international cooperation and joint operations among nations is fostering demand for electronic warfare, contributing to regional and global stability. The report provides insights on the following pointers:

Market Drivers: Market Drivers such as Significant government investments in electronic warfare systems, incorporation of electronic warfare capabilities onto unmanned platforms, growing adoption of modern warfare tactics, enhanced focus on cognitive electronic warfare technologies and other drivers covered in the report.

Market Penetration: Comprehensive information on electronic warfare offered by the top players in the market

Product Development/Innovation: Detailed insights on upcoming technologies, research & development activities, and new product launches in the electronic warfare market

Market Development: Comprehensive information about lucrative markets – the report analyses the electronic warfare market across varied regions.

Market Diversification: Exhaustive information about new products, untapped geographies, recent developments, and investments in the electronic warfare market

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Competitive Assessment: In-depth assessment of market shares, growth strategies, products, and manufacturing capabilities of leading players in the electronic warfare market

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