

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

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

Contents

1 INTRODUCTION

1.1 STUDY OBJECTIVES

1.2 MARKET DEFINITION

1.3 STUDY SCOPE

1.3.1 MARKETS COVERED

FIGURE 1 ELECTRONIC WARFARE MARKET SEGMENTATION

1.3.2 REGIONS COVERED

1.3.3 YEARS CONSIDERED

1.4 CURRENCY CONSIDERED

TABLE 1 USD EXCHANGE RATES

1.5 INCLUSIONS AND EXCLUSIONS

TABLE 2 INCLUSIONS AND EXCLUSIONS

1.6 STAKEHOLDERS

1.7 SUMMARY OF CHANGES

1.7.1 RECESSION IMPACT ANALYSIS

2 RESEARCH METHODOLOGY

2.1 RESEARCH DATA

FIGURE 2 RESEARCH PROCESS FLOW

FIGURE 3 RESEARCH DESIGN

2.1.1 SECONDARY DATA

2.1.1.1 Key data from secondary sources

2.1.2 PRIMARY DATA

2.1.2.1 Key data from primary sources

2.1.2.2 Breakdown of primary interviews

FIGURE 4 BREAKDOWN OF PRIMARY INTERVIEWS: BY COMPANY TYPE, DESIGNATION, AND REGION

2.2 FACTOR ANALYSIS

2.2.1 INTRODUCTION

2.2.2 DEMAND-SIDE INDICATORS

2.2.2.1 Increasing demand for aftermarket services

2.2.2.2 Rise in defense budgets of emerging economies

2.2.3 SUPPLY-SIDE ANALYSIS

2.2.3.1 Advancements in manufacturing technology

2.2.4 RECESSION IMPACT ANALYSIS

2.2.4.1 Impact of Russia-Ukraine War

FIGURE 5 IMPACT OF RUSSIA-UKRAINE WAR ON MACRO FACTORS

TABLE 3 IMPACT OF RUSSIA-UKRAINE WAR ON MICRO FACTORS

FIGURE 6 OVERALL IMPACT OF RUSSIA-UKRAINE WAR ON ELECTRONIC WARFARE MARKET

2.3 MARKET SIZE ESTIMATION

2.3.1 BOTTOM-UP APPROACH

FIGURE 7 BOTTOM-UP APPROACH

2.3.2 TOP-DOWN APPROACH

FIGURE 8 TOP-DOWN APPROACH

2.4 DATA TRIANGULATION

FIGURE 9 DATA TRIANGULATION

2.5 RESEARCH ASSUMPTIONS

FIGURE 10 RESEARCH ASSUMPTIONS

2.6 RESEARCH LIMITATIONS

2.7 RISK ASSESSMENT

3 EXECUTIVE SUMMARY

FIGURE 11 ELECTRONIC SUPPORT SEGMENT TO LEAD MARKET DURING FORECAST PERIOD

FIGURE 12 UPGRADES SEGMENT TO HAVE LARGEST MARKET SHARE DURING FORECAST PERIOD

FIGURE 13 SPACE PLATFORM TO WITNESS HIGHEST CAGR SHARE DURING FORECAST PERIOD

FIGURE 14 NORTH AMERICA TO ACCOUNT FOR LARGEST MARKET SHARE DURING FORECAST PERIOD

4 PREMIUM INSIGHTS

4.1 ATTRACTIVE GROWTH OPPORTUNITIES FOR PLAYERS IN ELECTRONIC WARFARE MARKET

FIGURE 15 COLLABORATIVE EFFORTS IN DEVELOPING AND PROCURING EW TECHNOLOGIES TO DRIVE MARKET

4.2 ELECTRONIC WARFARE MARKET, BY REGION

FIGURE 16 NORTH AMERICA TO DOMINATE MARKET DURING FORECAST PERIOD

4.3 ELECTRONIC WARFARE MARKET, BY PLATFORM

FIGURE 17 AIRBORNE PLATFORM SEGMENT SHOWCASED LARGEST MARKET

SHARE IN 2023

4.4 ELECTRONIC WARFARE MARKET, BY CAPABILITY

FIGURE 18 ELECTRONIC SUPPORT SEGMENT TO HAVE LARGEST MARKET SHARE DURING FORECAST PERIOD

4.5 ELECTRONIC WARFARE MARKET, BY END USE

FIGURE 19 UPGRADES SEGMENT TO RECORD LARGEST MARKET SHARE DURING FORECAST PERIOD

5 MARKET OVERVIEW

5.1 INTRODUCTION

5.2 MARKET DYNAMICS

FIGURE 20 ELECTRONIC WARFARE MARKET: DRIVERS, RESTRAINTS, OPPORTUNITIES, AND CHALLENGES

5.2.1 DRIVERS

5.2.1.1 Surge in military spending

TABLE 4 DEFENSE EXPENDITURE OF MAJOR COUNTRIES, 2020–2022 (USD BILLION)

FIGURE 21 DEFENSE EXPENDITURE OF MAJOR COUNTRIES, 2021 VS. 2022 (%)

5.2.1.2 Rising deployment of unmanned aerial vehicles

TABLE 5 UNMANNED PLATFORM DEVELOPMENTS

5.2.1.3 Increasing incorporation of electronic warfare systems

5.2.1.4 Growing adoption of modern warfare techniques

5.2.1.5 Rising focus on cognitive electronic warfare technologies

5.2.1.6 Increasing use of electronic warfare systems for geospatial intelligence gathering

5.2.2 RESTRAINTS

5.2.2.1 Budget constraints

5.2.2.2 Complexity and interoperability issues

5.2.3 OPPORTUNITIES

5.2.3.1 Development of air and missile defense systems

5.2.3.2 Increased use of traveling wave tube technology

5.2.3.3 Electronic warfare capabilities for space platforms

5.2.4 CHALLENGES

5.2.4.1 Stringent cross-border trading policies and regulatory compliances

5.2.4.2 Vulnerability to cyberattacks

5.2.4.3 Rapid evolution of war threats

5.3 TRENDS/DISRUPTIONS IMPACTING CUSTOMER BUSINESS

FIGURE 22 REVENUE SHIFT AND NEW REVENUE POCKETS FOR ELECTRONIC

WARFARE SYSTEM MANUFACTURERS

5.4 PRICING ANALYSIS

5.4.1 INDICATIVE PRICING ANALYSIS, BY PLATFORM

TABLE 6 INDICATIVE PRICING ANALYSIS, BY PLATFORM

FIGURE 23 INDICATIVE PRICING ANALYSIS, BY PLATFORM

5.5 OPERATIONAL DATA

TABLE 7 OPERATIONAL DATA FOR ACTIVE FLEET, 2020–2028

5.6 ECOSYSTEM ANALYSIS

5.6.1 PROMINENT COMPANIES

5.6.2 PRIVATE AND SMALL ENTERPRISES

5.6.3 END USERS

FIGURE 24 ECOSYSTEM MAPPING

TABLE 8 ROLE OF COMPANIES IN ECOSYSTEM

5.7 VALUE CHAIN ANALYSIS

FIGURE 25 VALUE CHAIN ANALYSIS

5.8 USE CASE ANALYSIS

5.8.1 SELF-PROTECTION SYSTEMS FOR TRANSPORT AIRCRAFT

5.8.2 ENHANCED NAVAL WARFARE WITH ELECTRONIC WARFARE SUITE

5.8.3 DEPLOYMENT OF GROUND-BASED ELECTRONIC WARFARE SYSTEMS

5.9 TRADE DATA ANALYSIS

FIGURE 26 PRODUCT HARMONIZED SYSTEM CODE (8526): EXPORT DATA FOR TOP 10 COUNTRIES

TABLE 9 PRODUCT HARMONIZED SYSTEM CODE (8526): COUNTRY-WISE EXPORTS, 2019–2022 (USD THOUSAND)

FIGURE 27 PRODUCT HARMONIZED SYSTEM CODE (8526): IMPORT DATA FOR TOP 10 COUNTRIES

TABLE 10 PRODUCT HARMONIZED SYSTEM CODE (8526): COUNTRY-WISE IMPORTS, 2019–2022 (USD THOUSAND)

5.10 KEY STAKEHOLDERS AND BUYING CRITERIA

5.10.1 KEY STAKEHOLDERS IN BUYING PROCESS

FIGURE 28 INFLUENCE OF STAKEHOLDERS ON BUYING PROCESS, BY PLATFORM

TABLE 11 INFLUENCE OF STAKEHOLDERS ON BUYING PROCESS, BY PLATFORM (%)

5.10.2 BUYING CRITERIA

FIGURE 29 KEY BUYING CRITERIA, BY PLATFORM

TABLE 12 KEY BUYING CRITERIA, BY PLATFORM

5.11 TECHNOLOGY ROADMAP

FIGURE 30 TECHNOLOGY ROADMAP

FIGURE 31 EVOLUTION OF TECHNOLOGY TRENDS

FIGURE 32 TECHNOLOGY TRENDS

5.12 BILL OF MATERIALS

FIGURE 33 BILL OF MATERIALS

5.13 TOTAL COST OF OWNERSHIP

TABLE 13 TOTAL COST OF OWNERSHIP

5.14 BUSINESS MODEL

TABLE 14 BUSINESS MODEL

5.15 REGULATORY LANDSCAPE

5.15.1 NORTH AMERICA: REGULATORY BODIES, GOVERNMENT AGENCIES, AND OTHER ORGANIZATIONS

5.15.2 EUROPE: REGULATORY BODIES, GOVERNMENT AGENCIES, AND OTHER ORGANIZATIONS

5.15.3 ASIA PACIFIC: REGULATORY BODIES, GOVERNMENT AGENCIES, AND OTHER ORGANIZATIONS

5.15.4 MIDDLE EAST: REGULATORY BODIES, GOVERNMENT AGENCIES, AND OTHER ORGANIZATIONS

5.15.5 REST OF THE WORLD: REGULATORY BODIES, GOVERNMENT AGENCIES, AND OTHER ORGANIZATIONS

5.16 KEY CONFERENCES AND EVENTS

TABLE 15 KEY CONFERENCES AND EVENTS, 2024

5.17 INVESTMENT AND FUNDING SCENARIO

TABLE 16 VENTURE CAPITALS AND DEALS, 2019?2022

FIGURE 34 VENTURE CAPITALS AND DEALS, 2019?2022

6 INDUSTRY TRENDS

6.1 INTRODUCTION

6.2 TECHNOLOGICAL TRENDS

6.2.1 INTEGRATION OF ADVANCED MATERIALS

6.2.2 ADAPTIVE RADAR COUNTERMEASURE (ARC) TECHNOLOGY

6.2.3 ADVANCED ELECTRONIC PROTECTION

6.2.4 EXPANDING USE OF UNMANNED SYSTEMS

6.2.5 HARDWARE MATERIAL TECHNOLOGIES

FIGURE 35 MATERIALS USED TO DEVELOP ELECTRONIC WARFARE HARDWARE (%)

6.3 TECHNOLOGY ANALYSIS

6.3.1 KEY TECHNOLOGIES

6.3.1.1 Next generation jammers

6.3.1.2 Artificial intelligence

6.3.1.3 Directed energy weapons

6.3.2 COMPLEMENTARY TECHNOLOGIES

6.3.2.1 3D printing of RF circuits

6.3.2.2 Development of electronically scanned array

6.3.2.3 Advanced analytics

6.4 IMPACT OF MEGATRENDS

6.4.1 DIGITALIZATION OF ADVANCED TECHNOLOGIES

6.4.2 UNIFIED BATTLEFIELD OPERATIONS WITH COLLABORATIVE COMBATS

6.5 SUPPLY CHAIN ANALYSIS

FIGURE 36 SUPPLY CHAIN ANALYSIS

6.6 PATENT ANALYSIS

FIGURE 37 PATENTS ANALYSIS

TABLE 17 INNOVATIONS AND PATENT REGISTRATIONS, 2022–2024

7 ELECTRONIC WARFARE MARKET, BY CAPABILITY

7.1 INTRODUCTION

FIGURE 38 ELECTRONIC WARFARE MARKET, BY CAPABILITY, 2023–2028 (USD MILLION)

TABLE 18 ELECTRONIC WARFARE MARKET, BY CAPABILITY, 2020–2022 (USD MILLION)

TABLE 19 ELECTRONIC WARFARE MARKET, BY CAPABILITY, 2023–2028 (USD MILLION)

7.2 ELECTRONIC SUPPORT

FIGURE 39 ELECTRONIC WARFARE MARKET, BY ELECTRONIC SUPPORT, 2023–2028 (USD MILLION)

TABLE 20 ELECTRONIC WARFARE MARKET, BY ELECTRONIC SUPPORT, 2020–2022 (USD MILLION)

TABLE 21 ELECTRONIC WARFARE MARKET, BY ELECTRONIC SUPPORT, 2023–2028 (USD MILLION)

7.2.1 SIGNALS INTELLIGENCE

FIGURE 40 ELECTRONIC WARFARE MARKET, BY SIGNALS INTELLIGENCE, 2023–2028 (USD MILLION)

TABLE 22 ELECTRONIC WARFARE MARKET, BY SIGNALS INTELLIGENCE, 2020–2022 (USD MILLION)

TABLE 23 ELECTRONIC WARFARE MARKET, BY SIGNALS INTELLIGENCE, 2023–2028 (USD MILLION)

7.2.1.1 Electronic intelligence

7.2.1.1.1 Direction finding, warning, and targeting applications to drive market

7.2.1.2 Communication intelligence

7.2.1.2.1 Crucial role in detecting and analyzing opponent movements to drive market

7.2.2 OTHER ELECTRONIC SUPPORT

7.3 ELECTRONIC ATTACK

FIGURE 41 ELECTRONIC WARFARE MARKET, BY ELECTRONIC ATTACK, 2023–2028 (USD MILLION)

TABLE 24 ELECTRONIC WARFARE MARKET, BY ELECTRONIC ATTACK, 2020–2022 (USD MILLION)

TABLE 25 ELECTRONIC ATTACK MARKET, BY ELECTRONIC ATTACK, 2023–2028 (USD MILLION)

7.3.1 ACTIVE

7.3.1.1 Growing focus on disrupting enemy radars and communication systems to drive market

7.3.2 PASSIVE

7.3.2.1 Rising integration of electronic control measures and low-observable technologies to drive market

7.4 ELECTRONIC PROTECTION

FIGURE 42 ELECTRONIC WARFARE MARKET, BY ELECTRONIC PROTECTION, 2023–2028 (USD MILLION)

TABLE 26 ELECTRONIC PROTECTION MARKET, BY ELECTRONIC PROTECTION, 2020–2022 (USD MILLION)

TABLE 27 ELECTRONIC PROTECTION MARKET, BY ELECTRONIC PROTECTION, 2023–2028 (USD MILLION)

7.4.1 ANTI-ACTIVE

7.4.1.1 Rising threats from advanced active radar systems to drive market

7.4.2 ANTI-PASSIVE

7.4.2.1 Need for improved operational security and target accuracy to drive market

8 ELECTRONIC WARFARE MARKET, BY PLATFORM

8.1 INTRODUCTION

TABLE 28 ELECTRONIC WARFARE PLATFORM DEVELOPMENTS

FIGURE 43 ELECTRONIC WARFARE MARKET, BY PLATFORM, 2023–2028 (USD MILLION)

TABLE 29 ELECTRONIC WARFARE MARKET, BY PLATFORM, 2020–2022 (USD MILLION)

TABLE 30 ELECTRONIC WARFARE MARKET, BY PLATFORM, 2023–2028 (USD

MILLION)

TABLE 31 ELECTRONIC WARFARE MARKET, BY PLATFORM, 2020–2022 (UNITS)

TABLE 32 ELECTRONIC WARFARE MARKET, BY PLATFORM, 2023–2028 (UNITS)

8.2 AIRBORNE PLATFORM

FIGURE 44 ELECTRONIC WARFARE MARKET, BY AIRBORNE PLATFORM, 2023–2028 (USD MILLION)

TABLE 33 ELECTRONIC WARFARE MARKET, BY AIRBORNE PLATFORM, 2020–2022 (USD MILLION)

TABLE 34 ELECTRONIC WARFARE MARKET, BY AIRBORNE PLATFORM, 2023–2028 (USD MILLION)

8.2.1 COMBAT AIRCRAFT

8.2.1.1 Rising emphasis on high speed, maneuverability, and compact size to drive market

8.2.2 TRANSPORT AIRCRAFT

8.2.2.1 Increasing use in aerial refueling and rescue missions to drive market

8.2.3 SPECIAL MISSION AIRCRAFT

8.2.3.1 Growing adoption in tactical and strategic missions to drive market

8.2.4 MILITARY HELICOPTERS

8.2.4.1 Medical evacuation, parachute drop, and aircraft recovery applications to drive market

8.2.5 UNMANNED AERIAL VEHICLES

8.2.5.1 Surge in technological advancements in drone payloads to drive market

8.3 GROUND PLATFORM

FIGURE 45 ELECTRONIC WARFARE MARKET, BY GROUND PLATFORM, 2023–2028 (USD MILLION)

TABLE 35 ELECTRONIC WARFARE MARKET, BY GROUND PLATFORM, 2020–2022 (USD MILLION)

TABLE 36 ELECTRONIC WARFARE MARKET, BY GROUND PLATFORM, 2023–2028 (USD MILLION)

8.3.1 VEHICLE-MOUNTED

8.3.1.1 Special analytical intelligence capabilities to drive market

8.3.2 SOLDIERS

8.3.2.1 Need for effective missions and force protection to drive market

8.3.3 GROUND STATIONS

8.3.3.1 Increasing need to safeguard critical infrastructure to drive market

8.4 NAVAL PLATFORM

FIGURE 46 ELECTRONIC WARFARE MARKET, BY NAVAL PLATFORM, 2023–2028 (USD MILLION)

TABLE 37 ELECTRONIC WARFARE MARKET, BY NAVAL PLATFORM, 2020–2022

(USD MILLION)

TABLE 38 ELECTRONIC WARFARE MARKET, BY NAVAL PLATFORM, 2023–2028

(USD MILLION)

8.4.1 SHIPS

8.4.1.1 Growing adoption of advanced maritime technology to drive market

8.4.2 SUBMARINES

8.4.2.1 Increasing use of sophisticated underwater platforms to drive market

8.4.3 UNMANNED MARINE VEHICLES

8.4.3.1 Undersea surveillance and rescue applications to drive market

8.5 SPACE PLATFORM

8.5.1 INCREASING DEMAND FOR SPACE-BASED SURVEILLANCE AND TRACKING TO DRIVE MARKET

9 ELECTRONIC WARFARE MARKET, BY END USE

9.1 INTRODUCTION

FIGURE 47 ELECTRONIC WARFARE MARKET, BY END USE, 2023–2028 (USD MILLION)

TABLE 39 ELECTRONIC WARFARE MARKET, BY END USE, 2020–2022 (USD MILLION)

TABLE 40 ELECTRONIC WARFARE MARKET, BY END USE, 2023–2028 (USD MILLION)

9.2 OEMS

9.2.1 ANTI-SUBMARINE WARFARE, AIR-TO-GROUND SUPPORT, AND AIR DEFENSE APPLICATIONS TO DRIVE MARKET

TABLE 41 OEM CONTRACTS

9.3 UPGRADES

9.3.1 GROWING AFTERSALES SUPPORT AGREEMENTS TO DRIVE MARKET

TABLE 42 UPGRADE CONTRACTS

10 ELECTRONIC WARFARE MARKET, BY PRODUCT

10.1 INTRODUCTION

FIGURE 48 ELECTRONIC WARFARE MARKET, BY PRODUCT, 2023–2028 (USD MILLION)

TABLE 43 ELECTRONIC WARFARE MARKET, BY PRODUCT, 2020–2022 (USD MILLION)

TABLE 44 ELECTRONIC WARFARE MARKET, BY PRODUCT, 2023–2028 (USD MILLION)

10.2 ELECTRONIC WARFARE EQUIPMENT

FIGURE 49 ELECTRONIC WARFARE MARKET, BY ELECTRONIC WARFARE EQUIPMENT, 2023–2028 (USD MILLION)

TABLE 45 ELECTRONIC WARFARE MARKET, BY ELECTRONIC WARFARE EQUIPMENT, 2020–2022 (USD MILLION)

TABLE 46 ELECTRONIC WARFARE MARKET, BY ELECTRONIC WARFARE EQUIPMENT, 2023–2028 (USD MILLION)

10.2.1 JAMMERS

FIGURE 50 ELECTRONIC WARFARE MARKET, BY JAMMERS, 2023–2028 (USD MILLION)

TABLE 47 ELECTRONIC WARFARE MARKET, BY JAMMERS, 2020–2022 (USD MILLION)

TABLE 48 ELECTRONIC WARFARE MARKET, BY JAMMERS, 2023–2028 (USD MILLION)

10.2.1.1 Radar jammers

FIGURE 51 ELECTRONIC WARFARE MARKET, BY RADAR JAMMERS, 2023–2028 (USD MILLION)

TABLE 49 ELECTRONIC WARFARE MARKET, BY RADAR JAMMERS, 2020–2022 (USD MILLION)

TABLE 50 ELECTRONIC WARFARE MARKET, BY RADAR JAMMERS, 2023–2028 (USD MILLION)

10.2.1.1.1 Electronic jammers

FIGURE 52 ELECTRONIC WARFARE MARKET, BY ELECTRONIC JAMMERS, 2023–2028 (USD MILLION)

TABLE 51 ELECTRONIC WARFARE MARKET, BY ELECTRONIC JAMMERS, 2020–2022 (USD MILLION)

TABLE 52 ELECTRONIC WARFARE MARKET, BY ELECTRONIC JAMMERS, 2023–2028 (USD MILLION)

10.2.1.1.1.1 Barrage jammers

10.2.1.1.1.2 Sweep jammers

10.2.1.1.1.3 Spot jammers

10.2.1.1.1.4 Pulse jammers

10.2.1.1.1.5 Digital radio frequency memory (DRFM) jammers

10.2.1.1.2 Mechanical jammers

FIGURE 53 ELECTRONIC WARFARE MARKET, BY MECHANICAL JAMMERS, 2023–2028 (USD MILLION)

TABLE 53 ELECTRONIC WARFARE MARKET, BY MECHANICAL JAMMERS, 2020–2022 (USD MILLION)

TABLE 54 ELECTRONIC WARFARE MARKET, BY MECHANICAL JAMMERS,

2023–2028 (USD MILLION)

10.2.1.1.2.1 Corner reflectors

10.2.1.1.2.2 Decoys

FIGURE 54 ELECTRONIC WARFARE MARKET, BY DECOYS, 2023–2028 (USD MILLION)

TABLE 55 ELECTRONIC WARFARE MARKET, BY DECOYS, 2020–2022 (USD MILLION)

TABLE 56 ELECTRONIC WARFARE MARKET, BY DECOYS, 2023–2028 (USD MILLION)

10.2.1.1.2.3 Flare dispensers

10.2.1.1.2.4 Chaff dispensers

10.2.1.2 Communication jammers

10.2.1.3 Remote-controlled improvised explosive device jammers

10.2.2 SELF-PROTECTION EW SUITE

10.2.2.1 Need to seek protection from missiles and laser beams to drive market

10.2.3 DIRECTED ENERGY WEAPONS

10.2.3.1 Expanding countermeasure applications to drive market

10.2.4 DIRECTION FINDERS

10.2.4.1 Increasing need for improved situational awareness and counterintelligence to drive market

10.2.5 DIRECTIONAL INFRARED COUNTERMEASURES

10.2.5.1 Growing focus on multi-mission functions to drive market

10.2.6 ANTI-RADIATION MISSILES

10.2.6.1 Rising use in military combat missions to drive market

10.2.7 ANTENNAS

10.2.7.1 Growing reliance on drones and unmanned systems to drive market

10.2.8 INFRARED MISSILE WARNING SYSTEMS

10.2.8.1 Booming use in military aircraft to drive market

10.2.9 IDENTIFICATION FRIEND OR FOE SYSTEMS

10.2.9.1 Growing adoption of aircraft survivability equipment to drive market

10.2.10 LASER WARNING SYSTEMS

10.2.10.1 Increasing use of laser targeting and guidance systems to drive market

10.2.11 ELECTROMAGNETIC SHIELDING/HARDENING MATERIALS

10.2.11.1 Surging demand to safeguard military assets and critical infrastructure to drive market

10.2.12 RADAR WARNING RECEIVERS

10.2.12.1 Need for improved countermeasure techniques to drive market

TABLE 57 RADAR WARNING RECEIVERS ACROSS COUNTRIES

10.2.13 COUNTER UAV SYSTEMS

10.2.13.1 Surge in demand for situational awareness and force protection to drive market

10.2.14 INTERFERENCE MITIGATION SYSTEMS

10.2.14.1 Emerging combat threats to drive market

10.2.15 ELECTROMAGNETIC PULSE WEAPONS

10.2.15.1 Booming technological advancements to drive market

10.3 OPERATIONAL SUPPORT

FIGURE 55 ELECTRONIC WARFARE MARKET, BY OPERATIONAL SUPPORT, 2023–2028 (USD MILLION)

TABLE 58 ELECTRONIC WARFARE MARKET, BY OPERATIONAL SUPPORT, 2020–2022 (USD MILLION)

TABLE 59 ELECTRONIC WARFARE MARKET, BY OPERATIONAL SUPPORT, 2023–2028 (USD MILLION)

10.3.1 SOFTWARE

10.3.1.1 Growing focus on gathering and analyzing critical information to drive market

10.3.2 SIMULATION

10.3.2.1 Increasing need to prepare for real-time operations to drive market

11 ELECTRONIC WARFARE MARKET, BY REGION

11.1 INTRODUCTION

11.2 REGIONAL RECESSION IMPACT ANALYSIS

FIGURE 56 ELECTRONIC WARFARE MARKET, BY REGION, 2023–2028

TABLE 60 ELECTRONIC WARFARE MARKET, BY REGION, 2020–2022 (USD MILLION)

TABLE 61 ELECTRONIC WARFARE MARKET, BY REGION, 2023–2028 (USD MILLION)

11.3 NORTH AMERICA

11.3.1 PESTLE ANALYSIS

11.3.2 RECESSION IMPACT ANALYSIS

FIGURE 57 NORTH AMERICA: ELECTRONIC WARFARE MARKET SNAPSHOT

TABLE 62 NORTH AMERICA: ELECTRONIC WARFARE MARKET, BY PLATFORM, 2020–2022 (USD MILLION)

TABLE 63 NORTH AMERICA: ELECTRONIC WARFARE MARKET, BY PLATFORM, 2023–2028 (USD MILLION)

TABLE 64 NORTH AMERICA: ELECTRONIC WARFARE MARKET, BY AIRBORNE PLATFORM, 2020–2022 (USD MILLION)

TABLE 65 NORTH AMERICA: ELECTRONIC WARFARE MARKET, BY AIRBORNE PLATFORM, 2023–2028 (USD MILLION)

TABLE 66 NORTH AMERICA: ELECTRONIC WARFARE MARKET, BY GROUND PLATFORM, 2020–2022 (USD MILLION)

TABLE 67 NORTH AMERICA: ELECTRONIC WARFARE MARKET, BY GROUND PLATFORM, 2023–2028 (USD MILLION)

TABLE 68 NORTH AMERICA: ELECTRONIC WARFARE MARKET, BY NAVAL PLATFORM, 2020–2022 (USD MILLION)

TABLE 69 NORTH AMERICA: ELECTRONIC WARFARE MARKET, BY NAVAL PLATFORM, 2023–2028 (USD MILLION)

TABLE 70 NORTH AMERICA: ELECTRONIC WARFARE MARKET, BY CAPABILITY, 2020–2022 (USD MILLION)

TABLE 71 NORTH AMERICA: ELECTRONIC WARFARE MARKET, BY CAPABILITY, 2023–2028 (USD MILLION)

TABLE 72 NORTH AMERICA: ELECTRONIC WARFARE MARKET, BY ELECTRONIC SUPPORT, 2020–2022 (USD MILLION)

TABLE 73 NORTH AMERICA: ELECTRONIC WARFARE MARKET, BY ELECTRONIC SUPPORT, 2023–2028 (USD MILLION)

TABLE 74 NORTH AMERICA: ELECTRONIC WARFARE MARKET, BY SIGNALS INTELLIGENCE, 2020–2022 (USD MILLION)

TABLE 75 NORTH AMERICA: ELECTRONIC WARFARE MARKET, BY SIGNALS INTELLIGENCE, 2023–2028 (USD MILLION)

TABLE 76 NORTH AMERICA: ELECTRONIC WARFARE MARKET, BY ELECTRONIC ATTACK, 2020–2022 (USD MILLION)

TABLE 77 NORTH AMERICA: ELECTRONIC WARFARE MARKET, BY ELECTRONIC ATTACK, 2023–2028 (USD MILLION)

TABLE 78 NORTH AMERICA: ELECTRONIC WARFARE MARKET, BY ELECTRONIC PROTECTION, 2020–2022 (USD MILLION)

TABLE 79 NORTH AMERICA: ELECTRONIC WARFARE MARKET, BY ELECTRONIC PROTECTION, 2023–2028 (USD MILLION)

TABLE 80 NORTH AMERICA: ELECTRONIC WARFARE MARKET, BY END USE, 2020–2022 (USD MILLION)

TABLE 81 NORTH AMERICA: ELECTRONIC WARFARE MARKET, BY END USE, 2023–2028 (USD MILLION)

11.3.3 US

11.3.3.1 Ground-based electronic warfare programs and system upgrades to drive market

TABLE 82 US: ELECTRONIC WARFARE MARKET, BY PLATFORM, 2020–2022 (USD MILLION)

TABLE 83 US: ELECTRONIC WARFARE MARKET, BY PLATFORM, 2023–2028 (USD MILLION)

TABLE 84 US: ELECTRONIC WARFARE MARKET, BY AIRBORNE PLATFORM,
2020–2022 (USD MILLION)

TABLE 85 US: ELECTRONIC WARFARE MARKET, BY AIRBORNE PLATFORM,
2023–2028 (USD MILLION)

TABLE 86 US: ELECTRONIC WARFARE MARKET, BY GROUND PLATFORM,
2020–2022 (USD MILLION)

TABLE 87 US: ELECTRONIC WARFARE MARKET, BY GROUND PLATFORM,
2023–2028 (USD MILLION)

TABLE 88 US: ELECTRONIC WARFARE MARKET, BY NAVAL PLATFORM,
2020–2022 (USD MILLION)

TABLE 89 US: ELECTRONIC WARFARE MARKET, BY NAVAL PLATFORM,
2023–2028 (USD MILLION)

TABLE 90 US: ELECTRONIC WARFARE MARKET, BY CAPABILITY, 2020–2022
(USD MILLION)

TABLE 91 US: ELECTRONIC WARFARE MARKET, BY CAPABILITY, 2023–2028
(USD MILLION)

11.3.4 CANADA

11.3.4.1 Maritime Helicopter Project to drive market

TABLE 92 CANADA: ELECTRONIC WARFARE MARKET, BY PLATFORM, 2020–2022
(USD MILLION)

TABLE 93 CANADA: ELECTRONIC WARFARE MARKET, BY PLATFORM, 2023–2028
(USD MILLION)

TABLE 94 CANADA: ELECTRONIC WARFARE MARKET, BY AIRBORNE
PLATFORM, 2020–2022 (USD MILLION)

TABLE 95 CANADA: ELECTRONIC WARFARE MARKET, BY AIRBORNE
PLATFORM, 2023–2028 (USD MILLION)

TABLE 96 CANADA: ELECTRONIC WARFARE MARKET, BY GROUND PLATFORM,
2020–2022 (USD MILLION)

TABLE 97 CANADA: ELECTRONIC WARFARE MARKET, BY GROUND PLATFORM,
2023–2028 (USD MILLION)

TABLE 98 CANADA: ELECTRONIC WARFARE MARKET, BY NAVAL PLATFORM,
2020–2022 (USD MILLION)

TABLE 99 CANADA: ELECTRONIC WARFARE MARKET, BY NAVAL PLATFORM,
2023–2028 (USD MILLION)

TABLE 100 CANADA: ELECTRONIC WARFARE MARKET, BY CAPABILITY,
2020–2022 (USD MILLION)

TABLE 101 CANADA: ELECTRONIC WARFARE MARKET, BY CAPABILITY,
2023–2028 (USD MILLION)

11.4 EUROPE

11.4.1 PESTLE ANALYSIS

11.4.2 RECESSION IMPACT ANALYSIS

FIGURE 58 EUROPE: ELECTRONIC WARFARE MARKET SNAPSHOT

TABLE 102 EUROPE: ELECTRONIC WARFARE MARKET, BY COUNTRY, 2020–2022 (USD MILLION)

TABLE 103 EUROPE: ELECTRONIC WARFARE MARKET, BY COUNTRY, 2023–2028 (USD MILLION)

TABLE 104 EUROPE: ELECTRONIC WARFARE MARKET, BY PLATFORM, 2020–2022 (USD MILLION)

TABLE 105 EUROPE: ELECTRONIC WARFARE MARKET, BY PLATFORM, 2023–2028 (USD MILLION)

TABLE 106 EUROPE: ELECTRONIC WARFARE MARKET, BY AIRBORNE PLATFORM, 2020–2022 (USD MILLION)

TABLE 107 EUROPE: ELECTRONIC WARFARE MARKET, BY AIRBORNE PLATFORM, 2023–2028 (USD MILLION)

TABLE 108 EUROPE: ELECTRONIC WARFARE MARKET, BY GROUND PLATFORM, 2020–2022 (USD MILLION)

TABLE 109 EUROPE: ELECTRONIC WARFARE MARKET, BY GROUND PLATFORM, 2023–2028 (USD MILLION)

TABLE 110 EUROPE: ELECTRONIC WARFARE MARKET, BY NAVAL PLATFORM, 2020–2022 (USD MILLION)

TABLE 111 EUROPE: ELECTRONIC WARFARE MARKET, BY NAVAL PLATFORM, 2023–2028 (USD MILLION)

TABLE 112 EUROPE: ELECTRONIC WARFARE MARKET, BY CAPABILITY, 2020–2022 (USD MILLION)

TABLE 113 EUROPE: ELECTRONIC WARFARE MARKET, BY CAPABILITY, 2023–2028 (USD MILLION)

TABLE 114 EUROPE: ELECTRONIC WARFARE MARKET, BY ELECTRONIC SUPPORT, 2020–2022 (USD MILLION)

TABLE 115 EUROPE: ELECTRONIC WARFARE MARKET, BY ELECTRONIC SUPPORT, 2023–2028 (USD MILLION)

TABLE 116 EUROPE: ELECTRONIC WARFARE MARKET, BY SIGNALS INTELLIGENCE, 2020–2022 (USD MILLION)

TABLE 117 EUROPE: ELECTRONIC WARFARE MARKET, BY SIGNALS INTELLIGENCE, 2023–2028 (USD MILLION)

TABLE 118 EUROPE: ELECTRONIC WARFARE MARKET, BY ELECTRONIC ATTACK, 2020–2022 (USD MILLION)

TABLE 119 EUROPE: ELECTRONIC WARFARE MARKET, BY ELECTRONIC ATTACK, 2023–2028 (USD MILLION)

TABLE 120 EUROPE: ELECTRONIC WARFARE MARKET, BY ELECTRONIC PROTECTION, 2020–2022 (USD MILLION)

TABLE 121 EUROPE: ELECTRONIC WARFARE MARKET, BY ELECTRONIC PROTECTION, 2023–2028 (USD MILLION)

TABLE 122 EUROPE: ELECTRONIC WARFARE MARKET, BY END USE, 2020–2022 (USD MILLION)

TABLE 123 EUROPE: ELECTRONIC WARFARE MARKET, BY END USE, 2023–2028 (USD MILLION)

11.4.3 GERMANY

11.4.3.1 German Aerospace Centre initiatives to drive market

TABLE 124 GERMANY: ELECTRONIC WARFARE MARKET, BY PLATFORM, 2020–2022 (USD MILLION)

TABLE 125 GERMANY: ELECTRONIC WARFARE MARKET, BY PLATFORM, 2023–2028 (USD MILLION)

TABLE 126 GERMANY: ELECTRONIC WARFARE MARKET, BY AIRBORNE PLATFORM, 2020–2022 (USD MILLION)

TABLE 127 GERMANY: ELECTRONIC WARFARE MARKET, BY AIRBORNE PLATFORM, 2023–2028 (USD MILLION)

TABLE 128 GERMANY: ELECTRONIC WARFARE MARKET, BY GROUND PLATFORM, 2020–2022 (USD MILLION)

TABLE 129 GERMANY: ELECTRONIC WARFARE MARKET, BY GROUND PLATFORM, 2023–2028 (USD MILLION)

TABLE 130 GERMANY: ELECTRONIC WARFARE MARKET, BY NAVAL PLATFORM, 2020–2022 (USD MILLION)

TABLE 131 GERMANY: ELECTRONIC WARFARE MARKET, BY NAVAL PLATFORM, 2023–2028 (USD MILLION)

TABLE 132 GERMANY: ELECTRONIC WARFARE MARKET, BY CAPABILITY, 2020–2022 (USD MILLION)

TABLE 133 GERMANY: ELECTRONIC WARFARE MARKET, BY CAPABILITY, 2023–2028 (USD MILLION)

11.4.4 UK

11.4.4.1 Royal Air Force upgrade programs to drive market

TABLE 134 UK: ELECTRONIC WARFARE MARKET, BY PLATFORM, 2020–2022 (USD MILLION)

TABLE 135 UK: ELECTRONIC WARFARE MARKET, BY PLATFORM, 2023–2028 (USD MILLION)

TABLE 136 UK: ELECTRONIC WARFARE MARKET, BY AIRBORNE PLATFORM, 2020–2022 (USD MILLION)

TABLE 137 UK: ELECTRONIC WARFARE MARKET, BY AIRBORNE PLATFORM,

2023–2028 (USD MILLION)

TABLE 138 UK: ELECTRONIC WARFARE MARKET, BY GROUND PLATFORM,
2020–2022 (USD MILLION)

TABLE 139 UK: ELECTRONIC WARFARE MARKET, BY GROUND PLATFORM,
2023–2028 (USD MILLION)

TABLE 140 UK: ELECTRONIC WARFARE MARKET, BY NAVAL PLATFORM,
2020–2022 (USD MILLION)

TABLE 141 UK: ELECTRONIC WARFARE MARKET, BY NAVAL PLATFORM,
2023–2028 (USD MILLION)

TABLE 142 UK: ELECTRONIC WARFARE MARKET, BY CAPABILITY, 2020–2022
(USD MILLION)

TABLE 143 UK: ELECTRONIC WARFARE MARKET, BY CAPABILITY, 2023–2028
(USD MILLION)

11.4.5 FRANCE

11.4.5.1 Defence Procurement Agency program and Military Programming Law funds
to drive market

TABLE 144 FRANCE: ELECTRONIC WARFARE MARKET, BY PLATFORM,
2020–2022 (USD MILLION)

TABLE 145 FRANCE: ELECTRONIC WARFARE MARKET, BY PLATFORM,
2023–2028 (USD MILLION)

TABLE 146 FRANCE: ELECTRONIC WARFARE MARKET, BY AIRBORNE
PLATFORM, 2020–2022 (USD MILLION)

TABLE 147 FRANCE: ELECTRONIC WARFARE MARKET, BY AIRBORNE
PLATFORM, 2023–2028 (USD MILLION)

TABLE 148 FRANCE: ELECTRONIC WARFARE MARKET, BY GROUND PLATFORM,
2020–2022 (USD MILLION)

TABLE 149 FRANCE: ELECTRONIC WARFARE MARKET, BY GROUND PLATFORM,
2023–2028 (USD MILLION)

TABLE 150 FRANCE: ELECTRONIC WARFARE MARKET, BY NAVAL PLATFORM,
2020–2022 (USD MILLION)

TABLE 151 FRANCE: ELECTRONIC WARFARE MARKET, BY NAVAL PLATFORM,
2023–2028 (USD MILLION)

TABLE 152 FRANCE: ELECTRONIC WARFARE MARKET, BY CAPABILITY,
2020–2022 (USD MILLION)

TABLE 153 FRANCE: ELECTRONIC WARFARE MARKET, BY CAPABILITY,
2023–2028 (USD MILLION)

11.4.6 ITALY

11.4.6.1 Multi-Year Defence Planning Document programs to drive market
TABLE 154 ITALY: ELECTRONIC WARFARE MARKET, BY PLATFORM, 2020–2022

(USD MILLION)

TABLE 155 ITALY: ELECTRONIC WARFARE MARKET, BY PLATFORM, 2023–2028

(USD MILLION)

TABLE 156 ITALY: ELECTRONIC WARFARE MARKET, BY AIRBORNE PLATFORM, 2020–2022 (USD MILLION)

TABLE 157 ITALY: ELECTRONIC WARFARE MARKET, BY AIRBORNE PLATFORM, 2023–2028 (USD MILLION)

TABLE 158 ITALY: ELECTRONIC WARFARE MARKET, BY GROUND PLATFORM, 2020–2022 (USD MILLION)

TABLE 159 ITALY: ELECTRONIC WARFARE MARKET, BY GROUND PLATFORM, 2023–2028 (USD MILLION)

TABLE 160 ITALY: ELECTRONIC WARFARE MARKET, BY NAVAL PLATFORM, 2020–2022 (USD MILLION)

TABLE 161 ITALY: ELECTRONIC WARFARE MARKET, BY NAVAL PLATFORM, 2023–2028 (USD MILLION)

TABLE 162 ITALY: ELECTRONIC WARFARE MARKET, BY CAPABILITY, 2020–2022 (USD MILLION)

TABLE 163 ITALY: ELECTRONIC WARFARE MARKET, BY CAPABILITY, 2023–2028 (USD MILLION)

11.4.7 REST OF EUROPE

TABLE 164 REST OF EUROPE: ELECTRONIC WARFARE MARKET, BY PLATFORM, 2020–2022 (USD MILLION)

TABLE 165 REST OF EUROPE: ELECTRONIC WARFARE MARKET, BY PLATFORM, 2023–2028 (USD MILLION)

TABLE 166 REST OF EUROPE: ELECTRONIC WARFARE MARKET, BY AIRBORNE PLATFORM, 2020–2022 (USD MILLION)

TABLE 167 REST OF EUROPE: ELECTRONIC WARFARE MARKET, BY AIRBORNE PLATFORM, 2023–2028 (USD MILLION)

TABLE 168 REST OF EUROPE: ELECTRONIC WARFARE MARKET, BY GROUND PLATFORM, 2020–2022 (USD MILLION)

TABLE 169 REST OF EUROPE: ELECTRONIC WARFARE MARKET, BY GROUND PLATFORM, 2023–2028 (USD MILLION)

TABLE 170 REST OF EUROPE: ELECTRONIC WARFARE MARKET, BY NAVAL PLATFORM, 2020–2022 (USD MILLION)

TABLE 171 REST OF EUROPE: ELECTRONIC WARFARE MARKET, BY NAVAL PLATFORM, 2023–2028 (USD MILLION)

TABLE 172 REST OF EUROPE: ELECTRONIC WARFARE MARKET, BY CAPABILITY, 2020–2022 (USD MILLION)

TABLE 173 REST OF EUROPE: ELECTRONIC WARFARE MARKET, BY

CAPABILITY, 2023–2028 (USD MILLION)

11.5 ASIA PACIFIC

11.5.1 PESTLE ANALYSIS

11.5.2 RECESSION IMPACT ANALYSIS

FIGURE 59 ASIA PACIFIC: ELECTRONIC WARFARE MARKET SNAPSHOT

TABLE 174 ASIA PACIFIC: ELECTRONIC WARFARE MARKET, BY COUNTRY,
2020–2022 (USD MILLION)TABLE 175 ASIA PACIFIC: ELECTRONIC WARFARE MARKET, BY COUNTRY,
2023–2028 (USD MILLION)TABLE 176 ASIA PACIFIC: ELECTRONIC WARFARE MARKET, BY PLATFORM,
2020–2022 (USD MILLION)TABLE 177 ASIA PACIFIC: ELECTRONIC WARFARE MARKET, BY PLATFORM,
2023–2028 (USD MILLION)TABLE 178 ASIA PACIFIC: ELECTRONIC WARFARE MARKET, BY AIRBORNE
PLATFORM, 2020–2022 (USD MILLION)TABLE 179 ASIA PACIFIC: ELECTRONIC WARFARE MARKET, BY AIRBORNE
PLATFORM, 2023–2028 (USD MILLION)TABLE 180 ASIA PACIFIC: ELECTRONIC WARFARE MARKET, BY GROUND
PLATFORM, 2020–2022 (USD MILLION)TABLE 181 ASIA PACIFIC: ELECTRONIC WARFARE MARKET, BY GROUND
PLATFORM, 2023–2028 (USD MILLION)TABLE 182 ASIA PACIFIC: ELECTRONIC WARFARE MARKET, BY NAVAL
PLATFORM, 2020–2022 (USD MILLION)TABLE 183 ASIA PACIFIC: ELECTRONIC WARFARE MARKET, BY NAVAL
PLATFORM, 2023–2028 (USD MILLION)TABLE 184 ASIA PACIFIC: ELECTRONIC WARFARE MARKET, BY CAPABILITY,
2020–2022 (USD MILLION)TABLE 185 ASIA PACIFIC: ELECTRONIC WARFARE MARKET, BY CAPABILITY,
2023–2028 (USD MILLION)TABLE 186 ASIA PACIFIC: ELECTRONIC WARFARE MARKET, BY ELECTRONIC
SUPPORT, 2020–2022 (USD MILLION)TABLE 187 ASIA PACIFIC: ELECTRONIC WARFARE MARKET, BY ELECTRONIC
SUPPORT, 2023–2028 (USD MILLION)TABLE 188 ASIA PACIFIC: ELECTRONIC WARFARE MARKET, BY SIGNALS
INTELLIGENCE, 2020–2022 (USD MILLION)TABLE 189 ASIA PACIFIC: ELECTRONIC WARFARE MARKET, BY SIGNALS
INTELLIGENCE, 2023–2028 (USD MILLION)TABLE 190 ASIA PACIFIC: ELECTRONIC WARFARE MARKET, BY ELECTRONIC
ATTACK, 2020–2022 (USD MILLION)

TABLE 191 ASIA PACIFIC: ELECTRONIC WARFARE MARKET, BY ELECTRONIC ATTACK, 2023–2028 (USD MILLION)

TABLE 192 ASIA PACIFIC: ELECTRONIC WARFARE MARKET, BY ELECTRONIC PROTECTION, 2020–2022 (USD MILLION)

TABLE 193 ASIA PACIFIC: ELECTRONIC WARFARE MARKET, BY ELECTRONIC PROTECTION, 2023–2028 (USD MILLION)

TABLE 194 ASIA PACIFIC: ELECTRONIC WARFARE MARKET, BY END USE, 2020–2022 (USD MILLION)

TABLE 195 ASIA PACIFIC: ELECTRONIC WARFARE MARKET, BY END USE, 2023–2028 (USD MILLION)

11.5.3 INDIA

11.5.3.1 Project Himshakti to drive market

TABLE 196 INDIA: ELECTRONIC WARFARE MARKET, BY PLATFORM, 2020–2022 (USD MILLION)

TABLE 197 INDIA: ELECTRONIC WARFARE MARKET, BY PLATFORM, 2023–2028 (USD MILLION)

TABLE 198 INDIA: ELECTRONIC WARFARE MARKET, BY AIRBORNE PLATFORM, 2020–2022 (USD MILLION)

TABLE 199 INDIA: ELECTRONIC WARFARE MARKET, BY AIRBORNE PLATFORM, 2023–2028 (USD MILLION)

TABLE 200 INDIA: ELECTRONIC WARFARE MARKET, BY GROUND PLATFORM, 2020–2022 (USD MILLION)

TABLE 201 INDIA: ELECTRONIC WARFARE MARKET, BY GROUND PLATFORM, 2023–2028 (USD MILLION)

TABLE 202 INDIA: ELECTRONIC WARFARE MARKET, BY NAVAL PLATFORM, 2020–2022 (USD MILLION)

TABLE 203 INDIA: ELECTRONIC WARFARE MARKET, BY NAVAL PLATFORM, 2023–2028 (USD MILLION)

TABLE 204 INDIA: ELECTRONIC WARFARE MARKET, BY CAPABILITY, 2020–2022 (USD MILLION)

TABLE 205 INDIA: ELECTRONIC WARFARE MARKET, BY CAPABILITY, 2023–2028 (USD MILLION)

11.5.4 JAPAN

11.5.4.1 Japanese Super Interceptor program to drive market

TABLE 206 JAPAN: ELECTRONIC WARFARE MARKET, BY PLATFORM, 2020–2022 (USD MILLION)

TABLE 207 JAPAN: ELECTRONIC WARFARE MARKET, BY PLATFORM, 2023–2028 (USD MILLION)

TABLE 208 JAPAN: ELECTRONIC WARFARE MARKET, BY AIRBORNE PLATFORM,

2020–2022 (USD MILLION)

TABLE 209 JAPAN: ELECTRONIC WARFARE MARKET, BY AIRBORNE PLATFORM,
2023–2028 (USD MILLION)

TABLE 210 JAPAN: ELECTRONIC WARFARE MARKET, BY GROUND PLATFORM,
2020–2022 (USD MILLION)

TABLE 211 JAPAN: ELECTRONIC WARFARE MARKET, BY GROUND PLATFORM,
2023–2028 (USD MILLION)

TABLE 212 JAPAN: ELECTRONIC WARFARE MARKET, BY NAVAL PLATFORM,
2020–2022 (USD MILLION)

TABLE 213 JAPAN: ELECTRONIC WARFARE MARKET, BY NAVAL PLATFORM,
2023–2028 (USD MILLION)

TABLE 214 JAPAN: ELECTRONIC WARFARE MARKET, BY CAPABILITY, 2020–2022
(USD MILLION)

TABLE 215 JAPAN: ELECTRONIC WARFARE MARKET, BY CAPABILITY, 2023–2028
(USD MILLION)

11.5.5 SINGAPORE

11.5.5.1 Singapore Defence Technology Summit programs to drive market

TABLE 216 SINGAPORE: ELECTRONIC WARFARE MARKET, BY PLATFORM,
2020–2022 (USD MILLION)

TABLE 217 SINGAPORE: ELECTRONIC WARFARE MARKET, BY PLATFORM,
2023–2028 (USD MILLION)

TABLE 218 SINGAPORE: ELECTRONIC WARFARE MARKET, BY AIRBORNE
PLATFORM, 2020–2022 (USD MILLION)

TABLE 219 SINGAPORE: ELECTRONIC WARFARE MARKET, BY AIRBORNE
PLATFORM, 2023–2028 (USD MILLION)

TABLE 220 SINGAPORE: ELECTRONIC WARFARE MARKET, BY GROUND
PLATFORM, 2020–2022 (USD MILLION)

TABLE 221 SINGAPORE: ELECTRONIC WARFARE MARKET, BY GROUND
PLATFORM, 2023–2028 (USD MILLION)

TABLE 222 SINGAPORE: ELECTRONIC WARFARE MARKET, BY NAVAL
PLATFORM, 2020–2022 (USD MILLION)

TABLE 223 SINGAPORE: ELECTRONIC WARFARE MARKET, BY NAVAL
PLATFORM, 2023–2028 (USD MILLION)

TABLE 224 SINGAPORE: ELECTRONIC WARFARE MARKET, BY CAPABILITY,
2020–2022 (USD MILLION)

TABLE 225 SINGAPORE: ELECTRONIC WARFARE MARKET, BY CAPABILITY,
2023–2028 (USD MILLION)

11.5.6 AUSTRALIA

11.5.6.1 Trilateral security partnership to drive market

TABLE 226 AUSTRALIA: ELECTRONIC WARFARE MARKET, BY PLATFORM, 2020–2022 (USD MILLION)

TABLE 227 AUSTRALIA: ELECTRONIC WARFARE MARKET, BY PLATFORM, 2023–2028 (USD MILLION)

TABLE 228 AUSTRALIA: ELECTRONIC WARFARE MARKET, BY AIRBORNE PLATFORM, 2020–2022 (USD MILLION)

TABLE 229 AUSTRALIA: ELECTRONIC WARFARE MARKET, BY AIRBORNE PLATFORM, 2023–2028 (USD MILLION)

TABLE 230 AUSTRALIA: ELECTRONIC WARFARE MARKET, BY GROUND PLATFORM, 2020–2022 (USD MILLION)

TABLE 231 AUSTRALIA: ELECTRONIC WARFARE MARKET, BY GROUND PLATFORM, 2023–2028 (USD MILLION)

TABLE 232 AUSTRALIA: ELECTRONIC WARFARE MARKET, BY NAVAL PLATFORM, 2020–2022 (USD MILLION)

TABLE 233 AUSTRALIA: ELECTRONIC WARFARE MARKET, BY NAVAL PLATFORM, 2023–2028 (USD MILLION)

TABLE 234 AUSTRALIA: ELECTRONIC WARFARE MARKET, BY CAPABILITY, 2020–2022 (USD MILLION)

TABLE 235 AUSTRALIA: ELECTRONIC WARFARE MARKET, BY CAPABILITY, 2023–2028 (USD MILLION)

11.5.7 REST OF ASIA PACIFIC

TABLE 236 REST OF ASIA PACIFIC: ELECTRONIC WARFARE MARKET, BY PLATFORM, 2020–2022 (USD MILLION)

TABLE 237 REST OF ASIA PACIFIC: ELECTRONIC WARFARE MARKET, BY PLATFORM, 2023–2028 (USD MILLION)

TABLE 238 REST OF ASIA PACIFIC: ELECTRONIC WARFARE MARKET, BY AIRBORNE PLATFORM, 2020–2022 (USD MILLION)

TABLE 239 REST OF ASIA PACIFIC: ELECTRONIC WARFARE MARKET, BY AIRBORNE PLATFORM, 2023–2028 (USD MILLION)

TABLE 240 REST OF ASIA PACIFIC: ELECTRONIC WARFARE MARKET, BY GROUND PLATFORM, 2020–2022 (USD MILLION)

TABLE 241 REST OF ASIA PACIFIC: ELECTRONIC WARFARE MARKET, BY GROUND PLATFORM, 2023–2028 (USD MILLION)

TABLE 242 REST OF ASIA PACIFIC: ELECTRONIC WARFARE MARKET, BY NAVAL PLATFORM, 2020–2022 (USD MILLION)

TABLE 243 REST OF ASIA PACIFIC: ELECTRONIC WARFARE MARKET, BY NAVAL PLATFORM, 2023–2028 (USD MILLION)

TABLE 244 REST OF ASIA PACIFIC: ELECTRONIC WARFARE MARKET, BY CAPABILITY, 2020–2022 (USD MILLION)

TABLE 245 REST OF ASIA PACIFIC: ELECTRONIC WARFARE MARKET, BY CAPABILITY, 2023–2028 (USD MILLION)

11.6 MIDDLE EAST

11.6.1 PESTLE ANALYSIS

11.6.2 RECESSION IMPACT ANALYSIS

FIGURE 60 MIDDLE EAST: ELECTRONIC WARFARE MARKET SNAPSHOT

TABLE 246 MIDDLE EAST: ELECTRONIC WARFARE MARKET, BY COUNTRY, 2020–2022 (USD MILLION)

TABLE 247 MIDDLE EAST: ELECTRONIC WARFARE MARKET, BY COUNTRY, 2023–2028 (USD MILLION)

TABLE 248 MIDDLE EAST: ELECTRONIC WARFARE MARKET, BY PLATFORM, 2020–2022 (USD MILLION)

TABLE 249 MIDDLE EAST: ELECTRONIC WARFARE MARKET, BY PLATFORM, 2023–2028 (USD MILLION)

TABLE 250 MIDDLE EAST: ELECTRONIC WARFARE MARKET, BY AIRBORNE PLATFORM, 2020–2022 (USD MILLION)

TABLE 251 MIDDLE EAST: ELECTRONIC WARFARE MARKET, BY AIRBORNE PLATFORM, 2023–2028 (USD MILLION)

TABLE 252 MIDDLE EAST: ELECTRONIC WARFARE MARKET, BY GROUND PLATFORM, 2020–2022 (USD MILLION)

TABLE 253 MIDDLE EAST: ELECTRONIC WARFARE MARKET, BY GROUND PLATFORM, 2023–2028 (USD MILLION)

TABLE 254 MIDDLE EAST: ELECTRONIC WARFARE MARKET, BY NAVAL PLATFORM, 2020–2022 (USD MILLION)

TABLE 255 MIDDLE EAST: ELECTRONIC WARFARE MARKET, BY NAVAL PLATFORM, 2023–2028 (USD MILLION)

TABLE 256 MIDDLE EAST: ELECTRONIC WARFARE MARKET, BY CAPABILITY, 2020–2022 (USD MILLION)

TABLE 257 MIDDLE EAST: ELECTRONIC WARFARE MARKET, BY CAPABILITY, 2023–2028 (USD MILLION)

TABLE 258 MIDDLE EAST: ELECTRONIC WARFARE MARKET, BY ELECTRONIC SUPPORT, 2020–2022 (USD MILLION)

TABLE 259 MIDDLE EAST: ELECTRONIC WARFARE MARKET, BY ELECTRONIC SUPPORT, 2023–2028 (USD MILLION)

TABLE 260 MIDDLE EAST: ELECTRONIC WARFARE MARKET, BY SIGNALS INTELLIGENCE, 2020–2022 (USD MILLION)

TABLE 261 MIDDLE EAST: ELECTRONIC WARFARE MARKET, BY SIGNALS INTELLIGENCE, 2023–2028 (USD MILLION)

TABLE 262 MIDDLE EAST: ELECTRONIC WARFARE MARKET, BY ELECTRONIC

ATTACK, 2020–2022 (USD MILLION)

TABLE 263 MIDDLE EAST: ELECTRONIC WARFARE MARKET, BY ELECTRONIC ATTACK, 2023–2028 (USD MILLION)

TABLE 264 MIDDLE EAST: ELECTRONIC WARFARE MARKET, BY ELECTRONIC PROTECTION, 2020–2022 (USD MILLION)

TABLE 265 MIDDLE EAST: ELECTRONIC WARFARE MARKET, BY ELECTRONIC PROTECTION, 2023–2028 (USD MILLION)

TABLE 266 MIDDLE EAST: ELECTRONIC WARFARE MARKET, BY END USE, 2020–2022 (USD MILLION)

TABLE 267 MIDDLE EAST: ELECTRONIC WARFARE MARKET, BY END USE, 2023–2028 (USD MILLION)

11.6.3 GCC

11.6.3.1 Saudi Arabia

11.6.3.1.1 Vision 2030 to drive market

TABLE 268 SAUDI ARABIA: ELECTRONIC WARFARE MARKET, BY PLATFORM, 2020–2022 (USD MILLION)

TABLE 269 SAUDI ARABIA: ELECTRONIC WARFARE MARKET, BY PLATFORM, 2023–2028 (USD MILLION)

TABLE 270 SAUDI ARABIA: ELECTRONIC WARFARE MARKET, BY AIRBORNE PLATFORM, 2020–2022 (USD MILLION)

TABLE 271 SAUDI ARABIA: ELECTRONIC WARFARE MARKET, BY AIRBORNE PLATFORM, 2023–2028 (USD MILLION)

TABLE 272 SAUDI ARABIA: ELECTRONIC WARFARE MARKET, BY GROUND PLATFORM, 2020–2022 (USD MILLION)

TABLE 273 SAUDI ARABIA: ELECTRONIC WARFARE MARKET, BY GROUND PLATFORM, 2023–2028 (USD MILLION)

TABLE 274 SAUDI ARABIA: ELECTRONIC WARFARE MARKET, BY NAVAL PLATFORM, 2020–2022 (USD MILLION)

TABLE 275 SAUDI ARABIA: ELECTRONIC WARFARE MARKET, BY NAVAL PLATFORM, 2023–2028 (USD MILLION)

TABLE 276 SAUDI ARABIA: ELECTRONIC WARFARE MARKET, BY CAPABILITY, 2020–2022 (USD MILLION)

TABLE 277 SAUDI ARABIA: ELECTRONIC WARFARE MARKET, BY CAPABILITY, 2023–2028 (USD MILLION)

11.6.3.2 UAE

11.6.3.2.1 Procurement of advanced defense systems to drive market

TABLE 278 UAE: ELECTRONIC WARFARE MARKET, BY PLATFORM, 2020–2022 (USD MILLION)

TABLE 279 UAE: ELECTRONIC WARFARE MARKET, BY PLATFORM, 2023–2028

(USD MILLION)

TABLE 280 UAE: ELECTRONIC WARFARE MARKET, BY AIRBORNE PLATFORM, 2020–2022 (USD MILLION)

TABLE 281 UAE: ELECTRONIC WARFARE MARKET, BY AIRBORNE PLATFORM, 2023–2028 (USD MILLION)

TABLE 282 UAE: ELECTRONIC WARFARE MARKET, BY GROUND PLATFORM, 2020–2022 (USD MILLION)

TABLE 283 UAE: ELECTRONIC WARFARE MARKET, BY GROUND PLATFORM, 2023–2028 (USD MILLION)

TABLE 284 UAE: ELECTRONIC WARFARE MARKET, BY NAVAL PLATFORM, 2020–2022 (USD MILLION)

TABLE 285 UAE: ELECTRONIC WARFARE MARKET, BY NAVAL PLATFORM, 2023–2028 (USD MILLION)

TABLE 286 UAE: ELECTRONIC WARFARE MARKET, BY CAPABILITY, 2020–2022 (USD MILLION)

TABLE 287 UAE: ELECTRONIC WARFARE MARKET, BY CAPABILITY, 2023–2028 (USD MILLION)

11.6.4 REST OF MIDDLE EAST

TABLE 288 REST OF MIDDLE EAST: ELECTRONIC WARFARE MARKET, BY PLATFORM, 2020–2022 (USD MILLION)

TABLE 289 REST OF MIDDLE EAST: ELECTRONIC WARFARE MARKET, BY PLATFORM, 2023–2028 (USD MILLION)

TABLE 290 REST OF MIDDLE EAST: ELECTRONIC WARFARE MARKET, BY AIRBORNE PLATFORM, 2020–2022 (USD MILLION)

TABLE 291 REST OF MIDDLE EAST: ELECTRONIC WARFARE MARKET, BY AIRBORNE PLATFORM, 2023–2028 (USD MILLION)

TABLE 292 REST OF MIDDLE EAST: ELECTRONIC WARFARE MARKET, BY GROUND PLATFORM, 2020–2022 (USD MILLION)

TABLE 293 REST OF MIDDLE EAST: ELECTRONIC WARFARE MARKET, BY GROUND PLATFORM, 2023–2028 (USD MILLION)

TABLE 294 REST OF MIDDLE EAST: ELECTRONIC WARFARE MARKET, BY NAVAL PLATFORM, 2020–2022 (USD MILLION)

TABLE 295 REST OF MIDDLE EAST: ELECTRONIC WARFARE MARKET, BY NAVAL PLATFORM, 2023–2028 (USD MILLION)

TABLE 296 REST OF MIDDLE EAST: ELECTRONIC WARFARE MARKET, BY CAPABILITY, 2020–2022 (USD MILLION)

TABLE 297 REST OF MIDDLE EAST: ELECTRONIC WARFARE MARKET, BY CAPABILITY, 2023–2028 (USD MILLION)

11.7 REST OF THE WORLD

11.7.1 PESTLE ANALYSIS

FIGURE 61 REST OF THE WORLD: ELECTRONIC WARFARE MARKET SNAPSHOT

TABLE 298 REST OF THE WORLD: ELECTRONIC WARFARE MARKET, BY REGION, 2020–2022 (USD MILLION)

TABLE 299 REST OF THE WORLD: ELECTRONIC WARFARE MARKET, BY REGION, 2023–2028 (USD MILLION)

TABLE 300 REST OF THE WORLD: ELECTRONIC WARFARE MARKET, BY PLATFORM, 2020–2022 (USD MILLION)

TABLE 301 REST OF THE WORLD: ELECTRONIC WARFARE MARKET, BY PLATFORM, 2023–2028 (USD MILLION)

TABLE 302 REST OF THE WORLD: ELECTRONIC WARFARE MARKET, BY AIRBORNE PLATFORM, 2020–2022 (USD MILLION)

TABLE 303 REST OF THE WORLD: ELECTRONIC WARFARE MARKET, BY AIRBORNE PLATFORM, 2023–2028 (USD MILLION)

TABLE 304 REST OF THE WORLD: ELECTRONIC WARFARE MARKET, BY GROUND PLATFORM, 2020–2022 (USD MILLION)

TABLE 305 REST OF THE WORLD: ELECTRONIC WARFARE MARKET, BY GROUND PLATFORM, 2023–2028 (USD MILLION)

TABLE 306 REST OF THE WORLD: ELECTRONIC WARFARE MARKET, BY NAVAL PLATFORM, 2020–2022 (USD MILLION)

TABLE 307 REST OF THE WORLD: ELECTRONIC WARFARE MARKET, BY NAVAL PLATFORM, 2023–2028 (USD MILLION)

TABLE 308 REST OF THE WORLD: ELECTRONIC WARFARE MARKET, BY CAPABILITY, 2020–2022 (USD MILLION)

TABLE 309 REST OF THE WORLD: ELECTRONIC WARFARE MARKET, BY CAPABILITY, 2023–2028 (USD MILLION)

TABLE 310 REST OF THE WORLD: ELECTRONIC WARFARE MARKET, BY ELECTRONIC SUPPORT, 2020–2022 (USD MILLION)

TABLE 311 REST OF THE WORLD: ELECTRONIC WARFARE MARKET, BY ELECTRONIC SUPPORT, 2023–2028 (USD MILLION)

TABLE 312 REST OF THE WORLD: ELECTRONIC WARFARE MARKET, BY SIGNALS INTELLIGENCE, 2020–2022 (USD MILLION)

TABLE 313 REST OF THE WORLD: ELECTRONIC WARFARE MARKET, BY SIGNALS INTELLIGENCE, 2023–2028 (USD MILLION)

TABLE 314 REST OF THE WORLD: ELECTRONIC WARFARE MARKET, BY ELECTRONIC ATTACK, 2020–2022 (USD MILLION)

TABLE 315 REST OF THE WORLD: ELECTRONIC WARFARE MARKET, BY ELECTRONIC ATTACK, 2023–2028 (USD MILLION)

TABLE 316 REST OF THE WORLD: ELECTRONIC WARFARE MARKET, BY

ELECTRONIC PROTECTION, 2020–2022 (USD MILLION)

TABLE 317 REST OF THE WORLD: ELECTRONIC WARFARE MARKET, BY
ELECTRONIC PROTECTION, 2023–2028 (USD MILLION)

TABLE 318 REST OF THE WORLD: ELECTRONIC WARFARE MARKET, BY END
USE, 2020–2022 (USD MILLION)

TABLE 319 REST OF THE WORLD: ELECTRONIC WARFARE MARKET, BY END
USE, 2023–2028 (USD MILLION)

11.7.2 LATIN AMERICA

11.7.2.1 Modernization programs in defense sector to drive market

TABLE 320 LATIN AMERICA: ELECTRONIC WARFARE MARKET, BY PLATFORM,
2020–2022 (USD MILLION)

TABLE 321 LATIN AMERICA: ELECTRONIC WARFARE MARKET, BY PLATFORM,
2023–2028 (USD MILLION)

TABLE 322 LATIN AMERICA: ELECTRONIC WARFARE MARKET, BY AIRBORNE
PLATFORM, 2020–2022 (USD MILLION)

TABLE 323 LATIN AMERICA: ELECTRONIC WARFARE MARKET, BY AIRBORNE
PLATFORM, 2023–2028 (USD MILLION)

TABLE 324 LATIN AMERICA: ELECTRONIC WARFARE MARKET, BY GROUND
PLATFORM, 2020–2022 (USD MILLION)

TABLE 325 LATIN AMERICA: ELECTRONIC WARFARE MARKET, BY GROUND
PLATFORM, 2023–2028 (USD MILLION)

TABLE 326 LATIN AMERICA: ELECTRONIC WARFARE MARKET, BY NAVAL
PLATFORM, 2020–2022 (USD MILLION)

TABLE 327 LATIN AMERICA: ELECTRONIC WARFARE MARKET, BY NAVAL
PLATFORM, 2023–2028 (USD MILLION)

TABLE 328 LATIN AMERICA: ELECTRONIC WARFARE MARKET, BY CAPABILITY,
2020–2022 (USD MILLION)

TABLE 329 LATIN AMERICA: ELECTRONIC WARFARE MARKET, BY CAPABILITY,
2023–2028 (USD MILLION)

11.7.3 AFRICA

11.7.3.1 Foreign Military Financing and Council for Scientific and Industrial Research
initiatives to drive market

TABLE 330 AFRICA: ELECTRONIC WARFARE MARKET, BY PLATFORM, 2020–2022
(USD MILLION)

TABLE 331 AFRICA: ELECTRONIC WARFARE MARKET, BY PLATFORM, 2023–2028
(USD MILLION)

TABLE 332 AFRICA: ELECTRONIC WARFARE MARKET, BY AIRBORNE
PLATFORM, 2020–2022 (USD MILLION)

TABLE 333 AFRICA: ELECTRONIC WARFARE MARKET, BY AIRBORNE

PLATFORM, 2023–2028 (USD MILLION)

TABLE 334 AFRICA: ELECTRONIC WARFARE MARKET, BY GROUND PLATFORM, 2020–2022 (USD MILLION)

TABLE 335 AFRICA: ELECTRONIC WARFARE MARKET, BY GROUND PLATFORM, 2023–2028 (USD MILLION)

TABLE 336 AFRICA: ELECTRONIC WARFARE MARKET, BY NAVAL PLATFORM, 2020–2022 (USD MILLION)

TABLE 337 AFRICA: ELECTRONIC WARFARE MARKET, BY NAVAL PLATFORM, 2023–2028 (USD MILLION)

TABLE 338 AFRICA: ELECTRONIC WARFARE MARKET, BY CAPABILITY, 2020–2022 (USD MILLION)

TABLE 339 AFRICA: ELECTRONIC WARFARE MARKET, BY CAPABILITY, 2023–2028 (USD MILLION)

12 COMPETITIVE LANDSCAPE

12.1 INTRODUCTION

12.2 STRATEGIES OF KEY PLAYERS

TABLE 340 STRATEGIES OF KEY PLAYERS

12.3 RANKING ANALYSIS

FIGURE 62 RANKING ANALYSIS OF TOP FIVE PLAYERS, 2022

12.4 MARKET SHARE ANALYSIS

FIGURE 63 MARKET SHARE ANALYSIS OF TOP FIVE PLAYERS, 2022

TABLE 341 DEGREE OF COMPETITION

12.5 REVENUE ANALYSIS

FIGURE 64 REVENUE ANALYSIS OF TOP FIVE PLAYERS, 2022

12.6 COMPANY EVALUATION MATRIX

12.6.1 STARS

12.6.2 EMERGING LEADERS

12.6.3 PERVASIVE PLAYERS

12.6.4 PARTICIPANTS

FIGURE 65 ELECTRONIC WARFARE MARKET: COMPANY EVALUATION MATRIX, 2022

12.6.5 COMPANY FOOTPRINT

FIGURE 66 ELECTRONIC WARFARE MARKET: COMPANY FOOTPRINT

TABLE 342 ELECTRONIC WARFARE MARKET: CAPABILITY FOOTPRINT

TABLE 343 ELECTRONIC WARFARE MARKET: PLATFORM FOOTPRINT

TABLE 344 ELECTRONIC WARFARE MARKET: REGION FOOTPRINT

12.7 STARTUP/SME EVALUATION MATRIX

12.7.1 PROGRESSIVE COMPANIES

12.7.2 RESPONSIVE COMPANIES

12.7.3 DYNAMIC COMPANIES

12.7.4 STARTING BLOCKS

FIGURE 67 ELECTRONIC WARFARE MARKET: STARTUP/SME EVALUATION MATRIX, 2022

12.7.5 COMPETITIVE BENCHMARKING

TABLE 345 ELECTRONIC WARFARE MARKET: KEY STARTUPS/SMES

TABLE 346 ELECTRONIC WARFARE MARKET: COMPETITIVE BENCHMARKING

12.8 COMPANY VALUATION AND FINANCIAL METRICS

TABLE 347 COMPANY VALUATION AND FINANCIAL METRICS, 2022

FIGURE 68 COMPANY VALUATION, 2022

FIGURE 69 FINANCIAL METRICS, 2022

12.9 BRAND COMPARISON

FIGURE 70 BRAND COMPARISON

12.10 COMPETITIVE SCENARIOS AND TRENDS

12.10.1 MARKET EVALUATION FRAMEWORK

12.10.2 PRODUCT LAUNCHES

TABLE 348 ELECTRONIC WARFARE MARKET: PRODUCT LAUNCHES, MAY 2022–DECEMBER 2023

12.10.3 DEALS

TABLE 349 ELECTRONIC WARFARE MARKET: DEALS, FEBRUARY 2020–DECEMBER 2023

12.10.4 OTHER DEVELOPMENTS

TABLE 350 ELECTRONIC WARFARE MARKET: OTHER DEVELOPMENTS, JANUARY 2020–FEBRUARY 2024

13 COMPANY PROFILES

(Business Overview, Products/Solutions/Services Offered, Recent Developments, and MnM View (Key strengths/Right to Win, Strategic Choices Made, and Weaknesses and Competitive Threats))*

13.1 INTRODUCTION

13.2 KEY PLAYERS

13.2.1 BAE SYSTEMS

TABLE 351 BAE SYSTEMS: COMPANY OVERVIEW

FIGURE 71 BAE SYSTEMS: COMPANY SNAPSHOT

TABLE 352 BAE SYSTEMS: PRODUCTS/SOLUTIONS/SERVICES OFFERED

TABLE 353 BAE SYSTEMS: PRODUCT LAUNCHES

TABLE 354 BAE SYSTEMS: OTHER DEVELOPMENTS

13.2.2 RAYTHEON TECHNOLOGIES CORPORATION

TABLE 355 RAYTHEON TECHNOLOGIES CORPORATION: COMPANY OVERVIEW

FIGURE 72 RAYTHEON TECHNOLOGIES CORPORATION: COMPANY SNAPSHOT

TABLE 356 RAYTHEON TECHNOLOGIES CORPORATION:

PRODUCTS/SOLUTIONS/SERVICES OFFERED

TABLE 357 RAYTHEON TECHNOLOGIES CORPORATION: PRODUCT LAUNCHES

TABLE 358 RAYTHEON TECHNOLOGIES CORPORATION: OTHER

DEVELOPMENTS

13.2.3 LOCKHEED MARTIN CORPORATION

TABLE 359 LOCKHEED MARTIN CORPORATION: COMPANY OVERVIEW

FIGURE 73 LOCKHEED MARTIN CORPORATION: COMPANY SNAPSHOT

TABLE 360 LOCKHEED MARTIN CORPORATION:

PRODUCTS/SOLUTIONS/SERVICES OFFERED

TABLE 361 LOCKHEED MARTIN CORPORATION: PRODUCT LAUNCHES

TABLE 362 LOCKHEED MARTIN CORPORATION: OTHER DEVELOPMENTS

13.2.4 ISRAEL AEROSPACE INDUSTRIES

TABLE 363 ISRAEL AEROSPACE INDUSTRIES: COMPANY OVERVIEW

FIGURE 74 ISRAEL AEROSPACE INDUSTRIES: COMPANY SNAPSHOT

TABLE 364 ISRAEL AEROSPACE INDUSTRIES:

PRODUCTS/SOLUTIONS/SERVICES OFFERED

TABLE 365 ISRAEL AEROSPACE INDUSTRIES: PRODUCT LAUNCHES

TABLE 366 ISRAEL AEROSPACE INDUSTRIES: OTHER DEVELOPMENTS

13.2.5 L3HARRIS TECHNOLOGIES, INC.

TABLE 367 L3HARRIS TECHNOLOGIES, INC.: COMPANY OVERVIEW

FIGURE 75 L3HARRIS TECHNOLOGIES, INC.: COMPANY SNAPSHOT

TABLE 368 L3HARRIS TECHNOLOGIES, INC.: PRODUCTS/SOLUTIONS/SERVICES
OFFERED

TABLE 369 L3HARRIS TECHNOLOGIES, INC.: OTHER DEVELOPMENTS

13.2.6 NORTHROP GRUMMAN

TABLE 370 NORTHROP GRUMMAN: COMPANY OVERVIEW

FIGURE 76 NORTHROP GRUMMAN: COMPANY SNAPSHOT

TABLE 371 NORTHROP GRUMMAN: PRODUCTS/SOLUTIONS/SERVICES
OFFERED

TABLE 372 NORTHROP GRUMMAN: DEALS

TABLE 373 NORTHROP GRUMMAN: OTHER DEVELOPMENTS

13.2.7 THALES

TABLE 374 THALES: COMPANY OVERVIEW

FIGURE 77 THALES: COMPANY SNAPSHOT

TABLE 375 THALES: PRODUCTS/SOLUTIONS/SERVICES OFFERED

TABLE 376 THALES: PRODUCT LAUNCHES

TABLE 377 THALES: OTHER DEVELOPMENTS

13.2.8 LEONARDO S.P.A.

TABLE 378 LEONARDO S.P.A.: COMPANY OVERVIEW

FIGURE 78 LEONARDO S.P.A.: COMPANY SNAPSHOT

TABLE 379 LEONARDO S.P.A.: PRODUCTS/SOLUTIONS/SERVICES OFFERED

TABLE 380 LEONARDO S.P.A.: PRODUCT LAUNCHES

TABLE 381 LEONARDO S.P.A.: OTHER DEVELOPMENTS

13.2.9 ELBIT SYSTEMS LTD.

TABLE 382 ELBIT SYSTEMS LTD.: COMPANY OVERVIEW

FIGURE 79 ELBIT SYSTEMS LTD.: COMPANY SNAPSHOT

TABLE 383 ELBIT SYSTEMS LTD.: PRODUCTS/SOLUTIONS/SERVICES OFFERED

TABLE 384 ELBIT SYSTEMS LTD.: OTHER DEVELOPMENTS

13.2.10 SAAB

TABLE 385 SAAB: COMPANY OVERVIEW

FIGURE 80 SAAB: COMPANY SNAPSHOT

TABLE 386 SAAB: PRODUCTS/SOLUTIONS/SERVICES OFFERED

TABLE 387 SAAB: PRODUCT LAUNCHES

TABLE 388 SAAB: DEALS

TABLE 389 SAAB: OTHER DEVELOPMENTS

13.2.11 GENERAL DYNAMICS CORPORATION

TABLE 390 GENERAL DYNAMICS CORPORATION: COMPANY OVERVIEW

FIGURE 81 GENERAL DYNAMICS CORPORATION: COMPANY SNAPSHOT

TABLE 391 GENERAL DYNAMICS CORPORATION:
PRODUCTS/SERVICES/SOLUTIONS OFFERED

13.2.12 COBHAM LIMITED

TABLE 392 COBHAM LIMITED: COMPANY OVERVIEW

TABLE 393 COBHAM LIMITED: PRODUCTS/SERVICES/SOLUTIONS OFFERED

TABLE 394 COBHAM LIMITED: OTHER DEVELOPMENTS

13.2.13 BHARAT ELECTRONICS LIMITED

TABLE 395 BHARAT ELECTRONICS LIMITED: COMPANY OVERVIEW

FIGURE 82 BHARAT ELECTRONICS LIMITED: COMPANY SNAPSHOT

TABLE 396 BHARAT ELECTRONICS LIMITED: PRODUCTS/SOLUTIONS/SERVICES
OFFERED

TABLE 397 BHARAT ELECTRONICS LIMITED: DEALS

TABLE 398 BHARAT ELECTRONICS LIMITED: OTHER DEVELOPMENTS

13.2.14 HENSOLDT

TABLE 399 HENSOLDT: COMPANY OVERVIEW

FIGURE 83 HENSOLDT: COMPANY SNAPSHOT

TABLE 400 HENSOLDT: PRODUCTS/SERVICES/SOLUTIONS OFFERED

TABLE 401 HENSOLDT: DEALS

TABLE 402 HENSOLDT: OTHER DEVELOPMENTS

13.2.15 INDRA

TABLE 403 INDRA: COMPANY OVERVIEW

FIGURE 84 INDRA: COMPANY SNAPSHOT

TABLE 404 INDRA: PRODUCTS/SOLUTIONS/SERVICES OFFERED

TABLE 405 INDRA: DEALS

13.2.16 ASELSAN A.S.

TABLE 406 ASELSAN A.S.: COMPANY OVERVIEW

FIGURE 85 ASELSAN A.S.: COMPANY SNAPSHOT

TABLE 407 ASELSAN A.S: PRODUCTS/SERVICES/SOLUTIONS OFFERED

TABLE 408 ASELSAN A.S.: DEALS

13.3 OTHER PLAYERS

13.3.1 RAFAEL ADVANCED DEFENSE SYSTEMS LIMITED

TABLE 409 RAFAEL ADVANCED DEFENSE SYSTEMS LIMITED: COMPANY OVERVIEW

13.3.2 TATA ADVANCED SYSTEMS LIMITED

TABLE 410 TATA ADVANCED SYSTEMS LIMITED: COMPANY OVERVIEW

13.3.3 L&T DEFENCE

TABLE 411 L&T DEFENCE: COMPANY OVERVIEW

13.3.4 SHOGHI COMMUNICATIONS LTD.

TABLE 412 SHOGHI COMMUNICATIONS LTD.: COMPANY OVERVIEW

13.3.5 RADIOELECTRONIC TECHNOLOGIES JSC (KRET)

TABLE 413 RADIOELECTRONIC TECHNOLOGIES JSC (KRET): COMPANY OVERVIEW

13.3.6 DATA PATTERNS PVT. LTD.

TABLE 414 DATA PATTERNS PVT. LTD.: COMPANY OVERVIEW

13.3.7 SIERRA NEVADA CORPORATION

TABLE 415 SIERRA NEVADA CORPORATION: COMPANY OVERVIEW

13.3.8 TEXTRON INC.

TABLE 416 TEXTRON INC.: COMPANY OVERVIEW

13.3.9 HR SMITH GROUP

TABLE 417 HR SMITH GROUP: COMPANY OVERVIEW

*Details on Business Overview, Products/Solutions/Services ducts Offered, Recent Developments, and MnM View (Key strengths/Right to Win, Strategic Choices Made, and Weaknesses and Competitive Threats) might not be captured in case of unlisted companies.

14 APPENDIX

14.1 DISCUSSION GUIDE

14.2 ANNEXURE A: DEFENSE PROGRAM MAPPING

14.3 KNOWLEDGESTORE: MARKETSANDMARKETS' SUBSCRIPTION PORTAL

14.4 CUSTOMIZATION OPTIONS

14.5 RELATED REPORTS

14.6 AUTHOR DETAILS

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