

Electronically Scanned Array Market by Installation, Platform (Air, Marine, Land), Frequency Band, Type, Component, Range, Dimension, Array Geometry and Region (North America, Europe, APAC, Middle East & Africa and Latin America) - Forecast to 2026

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Abstracts

The electronically scanned array market is estimated to be USD 7.4 billion in 2021 and is projected to reach USD 10.4 billion by 2026, at a CAGR of 7.1% from 2021 to 2026. Growth of this market can be attributed to the rise in trade of electronically scanned array, developments in the defense sector, and national security sector.

“Increasing defense expenditure of emerging economies to drive the market for electronically scanned array during the forecast period”

Emerging economies, such as China and India, are investing in advanced electronically scanned arrays to prepare themselves for any battle. These economies have increased their military budgets to augment their defense powers and are procuring advanced ESA-based navigation systems for air, marine, and land platforms. The growing GDP of the countries in the last decade has further helped increase their defense budgets.

High defense budgets allow economies like China and India to spend on the development of new ships and maintenance of old ships. This, in turn, increases the demand for electronically scanned arrays.

Development of Active Electronically Scanned Array radar

Active electronically scanned array (AESA) radar technology is a module containing a new generation of transceiver modules. Software-defined radio (SDR) is used for radio

communication because of its high data rates. The use of AESA technology is growing rapidly because of its enhanced reliability and affordability and is expected to replace conventional electronically scanned array in the near future. This has allowed countries such as the US, Norway, the Netherlands, India, and Israel, among others, to incorporate AESA into legacy/old systems on land, sea, and airborne platforms.

Due to its resistance to electronic jamming, low interception, high reliability, and multi-mode capability, countries around the world are adding AESA radar into their military aircraft and vessels and manufacturers around the world are working to meet demand. Incorporating AESA radar into aircraft/sea/or ground platforms will remain relevant since electronic warfare is becoming more important and without AESA, modern conventional militaries are obsolete.

In February 2022, Sweden-based SAAB AB received an order for the delivery of RBS 70 NG short-range air defense systems for the Argentine Armed Forces along with RMF-200V, an AESA tactical air defense radar for threat detection at medium and short distances, which could form the core of a low-altitude anti-air battery.

“Air: The largest segment of the Electronically scanned array market, by Platform.”

Airborne electronically scanned arrays are used to track land vehicles, aircraft, and enemy ammunition. Airborne early warning and control (AEW&C) systems use electronically scanned array radar for command and coordination on the battlefield. These radars are used in both defensive and offensive military operations.

The air platform segment is further segmented into unmanned aerial vehicles (UAVs), fixed-wing aircraft, and rotary-wing aircraft.

“Multifrequency: The fastest-growing segment of the electronically scanned array market, by Frequency band “

Multifrequency electronically scanned array radar signal processing is primarily conducted to improve signal resolution. A combination of different frequency bands is employed for a multiband signal processing system. The growing demand for better radar signals is one of the major factors driving the adoption of multiband electronically scanned arrays. Recent developments in photonic technologies have enabled multiband surveillance radar to explore applications that require high precision. A multiband electronically scanned array brings flexibility in surveillance activities by adapting to various criticalities in field operations.

A single beam source unit design for multiband transmitter and receiver is increasingly becoming prevalent among defense applications as it reduces complexities in production while reducing costs and the overall size of the electronically scanned array at the same time. Such multiband electronically scanned arrays are proving to be more reliable when compared with other types of military electronically scanned arrays and are being used for coherent detection and tracking of moving target objects.

In 2019, the US Navy awarded Raytheon Technologies (US) a contract worth USD 7.6 million to produce, test, and supply the navy multiband terminal (NMT), a satellite communication terminal used for military communications.

“Beamforming Network: The fastest-growing segment of the electronically scanned array market, by Component. “

Beamforming networks are array antennas that are designed to transmit and receive directional signals. Traditional beamformers are of two types: analog and digital. Analog beamformers are preferred over digital beamformers as the latter fail in detecting imbalance channels, amplitude, and phase errors. The BFN is built with appropriate phase shifters and couplers to gather different phase changes to direct the beam to the essential route, which is necessary for creating useful communication. This authorizes the arrangement to receive or transmit signals in a particular three-dimensional direction. As per simulated results, it has been found that the BFN is able to change the phase shift of 0.2 degrees for efficient detection.

“Active electronically scanned array (AESA): The fastest-growing segment of the electronically scanned array market, by Type. “

The AESA radar is also known as active phased array radar (APAR). It is equipped with transmitters and receivers, which are composed of numerous small solid-state transmitters/receiver modules. It provides high performance and is considered effective for radar resource management. It has been deployed by countries such as the US, Russia, Saudi Arabia, and China for their land and sea surveillance and tracking. AESA radar has a low noise amplifier and hence, provides low signal intermodulation. It is lightweight and efficient and uses less power.

South Korea upgraded its 134 aircraft, including Lockheed Martin/Korea Aerospace Industries KF-16C/Ds, with AESA radar for networking capabilities to track upcoming missiles and any other threats. The Electronics and Radar Development Establishment

(LRDE) of India upgraded its older radar systems with AESA fire control radar called UTTAM for light combat aircraft (LCA) in 2020.

“Fire Control Radar: The fastest-growing segment of the electronically scanned array market, by Installation. “

Fire control radar is used in fixed and rotary-wing military aircraft and a few fixed-wing unmanned aerial vehicles. The use of fire control radar in aircraft is to gather information about azimuth, elevation, and range of the target to the fire system to direct weapons in the right direction. The advantages of using an electronically scanned array in fire control radar are its fast response time and high accuracy.

Companies like Raytheon Technologies (US) and Leonardo S.p.A. (Italy) manufacture electronically scanned array-based fire control radar systems for fighter aircraft. Eurofighter Typhoons of Germany and France are installed with the active electronically scanned array radar named Mk-0 and Mk-1 developed by Thales Group (France). The UK has developed a more advanced active electronically scanned array radar named ECRS Mk-2 for their Typhoon aircraft with the help of Leonardo S.p.A. (Italy) and BAE Systems (UK).

“Long Range Radar: The fastest-growing segment of the electronically scanned array market, by Range. “

Long-range electronically scanned array radars are available within a range of 100 km and above. Air surveillance systems, military radar, air mapping systems, weapon control systems, and missile guidance systems can function with the help of long-range electronically scanned array radar.

Companies such as L&T Defence offer long-range radar with simultaneous modes of operations supporting multi-mission capabilities for land and sea operations and weapon deployments. Lockheed Martin Corporation (US) offers TPS-59, an electronically scanned array radar that covers a range of 740 km.

“Linear Array: The fastest-growing segment of the electronically scanned array market, by Array Geometry. “

Linear arrays are the most common and simple array arrangement. They are mounted vertically or horizontally, and the elements are provided with single-phase shifter. Linear array radars typically minimize the number of elements needed, and that is why they are

cheaper than planar arrays. Beam deflection can occur in a single-phase array otherwise, the current position of the antenna has to be changed in the two-phase array.

“4D: The fastest-growing segment of the electronically scanned array market, by Dimension. “

4D electronically scanned arrays determine the range, azimuth, height, and velocity vector of the detected object. They are expensive and are hence primarily used in autonomous tactical surveillance applications that generate high-resolution target signals. Advanced economies such as the US and Germany have invested substantially to conduct multiple-level research activities in the development of these electronically scanned arrays. The North American region is the largest market for 4D electronically scanned arrays

Thales Group (France) offers a 4D electronically scanned array for surveillance and ISR. These electronically scanned arrays provide bearing, range, elevation (3D), and an in-depth analysis of a target’s Doppler signature and other characteristics with a single scan. This analysis results in a superior air and surface detection, tracking, and classification of targets.

In 2019, Thales Group secured a contract to supply next-generation 4D active electronically scanned array technology to the Royal Netherlands Army. Hensoldt AG (Germany) also signed an agreement with the German government (BAAINBw) to supply its TRS-4D naval electronically scanned array.

“North America: The largest contributing region in the electronically scanned array market.”

The US and Canada are key countries considered for market analysis in the North American region. Defense agencies of these countries are involved in the development of technologically advanced electronically scanned arrays. Well-established and prominent manufacturers of electronically scanned arrays, such as Lockheed Martin Corporation (US), Northrop Grumman Corporation (US), the Boeing Company (US), and Raytheon Technologies Corporation (US), are present in this region.

Electronically scanned arrays are being increasingly used in critical missions due to their accurate targeting and friend or foe detection feature that enables armies to precisely neutralize threats to ensure the safety and security of the countries.

Breakdown of primaries

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

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

By Designation: C Level–35%; Directors–25%; and Others–40%

By Region: North America–40%; Europe–20%; Asia Pacific–30%; Middle East & Africa–5%; and South America–5%

SAAB AB (Sweden), Raytheon Technologies (US), Mitsubishi (Japan), Thales Group (France), Hanwha Systems (South Korea), Aselsan AS (Turkey), and General Dynamics (US) are some of the leading players operating in the electronically scanned array market report.

Research Coverage

The study covers the electronically scanned array market across various segments and subsegments. It aims at estimating the size and growth potential of this market across different segments based on Application, Platform, Frequency Band, Component, Range, Dimension, Technology, Type 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 product and business offerings, recent developments undertaken by them, and key market strategies adopted by them.

Reasons to Buy this Report

This report is expected to help market leaders/new entrants with information on the closest approximations of the revenue numbers for the overall electronically scanned array market and its segments. This study is also expected to provide region wise information about the end use, and wherein electronically scanned array are used. This report aims at helping the stakeholders understand the competitive landscape of the market, gain insights to improve the position of their businesses and plan suitable go-to-market strategies. This report is also expected to help them understand the pulse of the market and provide them with information on key drivers, restraints, challenges, and opportunities influencing the growth of the market.

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