

Radar Systems Market by Application, Platform (Air, Marine, Unmanned, Land, Space), Frequency Band, Type, Component, Range, Dimension, Technology, & Region (North America, Europe, Asia Pacific, Middle East & Africa and Latin America) - Forecast to 2026

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Abstracts

The radar systems market is estimated to be USD 32.5 billion in 2021 and is projected to reach USD 41.0 billion by 2026, at a CAGR of 4.8% from 2021 to 2026. Growth of this market can be attributed to the rise in trade of radar systems, developments in the defense sector, and national security sector.

“Increasing demand for advanced weather monitoring radar to drive the market for radar systems during the forecast period”

Weather monitoring radar, also known as weather surveillance radar (WSR) and Doppler weather radar, are developed to detect precipitation (rain, snow, and hail, among others) and calculate its direction of motion in order to estimate weather conditions in a particular region at a given time. These radar are used across commercial, scientific, and military applications, with many companies actively developing new technologies for use in weather monitoring. For instance, In June 2020, Honeywell (US) developed the IntuVue RDR-7000 Weather Radar System, which can be used in military and defense applications. The IntuVue RDR-7000 can also be used on urban mobility platforms such as air taxis and airborne emergency vehicles.

Furuno (Japan) offers two X-band weather Doppler radar, namely, the Single Polarimetric WR110 and the Dual Polarimetric WR2120. The WR110 Single Polarimetric radar is highly efficient for normal rain observation, while the WR2120 is highly sophisticated and facilitates observations, including three-dimensional analysis of

heavy precipitation cumulonimbus and localized rainfall prediction.

The development of various advanced weather monitoring radar and their increased adoption to accurately monitor and predict weather conditions is expected to boost the radar systems market in the near future. Weather radar fall under the land platform, which held a 26% share of the overall radar market in 2020.

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 radar systems 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.

“Marine: The largest segment of the Radar systems market, by Platform.”

Marine radar systems are used for the detection and tracking of marine activities, including those of warships, submarines, offshore patrol vessels, and other marine vessels. They are also used to detect other ships and land obstacles, to provide bearing and distance for collision avoidance and navigation at sea. These radar systems help in monitoring illegal activities such as smuggling, piracy, illicit fishing, and terrorist activities. They are typically X-band and S-band radar.

The European Multifunction Phased Array Radar (EMPAR) is an example of a marine

radar. It was developed by Selex ES (UK) to be installed aboard medium and large vessels for marine threat identification.

“Single band frequency: The fastest-growing segment of the radar systems market, by Frequency band “

Single band frequencies are further classified as radio waves which include UHF/VHF-bands; microwave, which is sub segmented into L-band, S-band, C-band, X-band, Ku/Ka-band, and others; and millimeter band.

“Antenna: The fastest-growing segment of the radar systems market, by Component. “

Antennas are used to radiate radio-frequency energy and are an essential component of radar as they are responsible for broadcasting the energy generated by the transmitter. They ensure that the radio frequency signal has the required pattern in space. The efficiency of radar is dependent on the type of antenna used. The most commonly used antennas are parabolic dish antennas and array antennas. A parabolic reflector radar antenna is used to track aerial targets. It has a parabolic reflector to direct radio waves and has a narrow beam to locate ships, airplanes, and guided missiles. Active phased array antennas are widely used for military applications due to their power to form factor ratio.

In this study, antennas are divided into rotating antennas, microstrip antennas, and electronically steered array antennas which are further divided into active and passive. The antennas segment of the radar systems market is projected to grow from USD 5,721 million in 2021 to USD 7,264 million by 2026, at a CAGR of 4.9% during the forecast period.

Israel Aerospace Industries offers the ELM-2114 Persistent Perimeter Detection Radar, which uses a planar array. It is a multi-beam, solid-state steering, and frequency modulated continuous wave (FMCW) radar that operates seamlessly with electro-optic sensors and command & control systems.

In March 2020, Raytheon Technologies Corporation developed its first radar antenna for lower-tier aircraft and missile guidance systems. This radar has three fixed arrays, which provide 360 degree support for detection and tracking.

“Active radar: The fastest-growing segment of the radar systems market, by Type. “

In an active radar, the transmitter and the receiver are located at the same place; hence, it is known as a monostatic radar. The principle of operation is simple: a radio wave is released from the antenna and reflects off the objects that the wave encounters. An active radar is effective in gathering a lot more information but also gives away the location of the information gathering station. This means that if being traced, the information gathering station can easily be a target.

Active radar systems are further segmented into Doppler and continuous wave radar.

“Defense: The fastest-growing segment of the radar systems market, by Application. “

The defense application is further segmented into perimeter security, battlefield surveillance, military space assets, and air defense.

“Long Range Radar: The fastest-growing segment of the radar systems market, by Range. “

Long-range radar are considered to have an instrumental range of 150 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 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, a radar system that covers a range of 740 km.

“Software-defined Radar: The fastest-growing segment of the radar systems market, by Technology. “

Software-defined radar can be defined as a radio technology wherein some physical layers or functions are defined and controlled by software, which makes the radar highly adaptable. Some basic software-defined radars use analog-to-digital converter chips that are connected to an antenna.

Software-defined radio technology is designed in such a way that some or all the physical functions are defined by software. All the operational changes such as performance, specification, and function are carried out by software without changing any hardware, making it a highly flexible and adaptable technology. The software-defined radar transmits and receives signals in a digital space, which is linked to an

analog-to-digital and digital-to-analog converter chip that is connected to an antenna. This radar system performs a surface search, periscope detection, and navigational functions. It also offers better defense against limited low altitude air threats.

In 2020, the US Navy signed a contract worth USD 42.2 million with Ultra Electronics Holdings plc (UK) to supply software-defined surface-search radar systems. Ultra Electronics Holdings plc is a provider of products and solutions to the transport & energy, security & cyber, defense, and aerospace markets.

“3D: The fastest-growing segment of the radar systems market, by Dimension. “

A 3D radar requires multiple receiving channels in parallel, and the radar antenna has to deploy multiple antenna patterns during the receiving time. Older 3D radar had a planar or linear phased array and did not transmit waves simultaneously in all directions under observation. This transmission was done sequentially in time. Antennas can scan the space within a limited swivel angle. This makes for two possibilities: first, either the antenna is rotating in azimuth and electronically scans the elevation angle, or second, there are four planar antennas statically distributed around a carrier, each covering only a quarter section of the hemisphere. Both variants allow for overall coverage around the radar site. 3D radar systems are capable of providing high target location accuracy along with fully automatic operation modes, which is resulting in the growing demand for military applications.

The rotating antenna has a critical disadvantage. As each elevation angle will be scanned sequentially in time, the antenna must not rotate too fast to avoid any gaps in the reconnaissance by the limited time. However, the version using static antennas has the time scheduling advantage as virtually four radar scan the space simultaneously. The front ends of these four radar are subject to common radar data processing and display. The radar can operate with more flexibility, and it can be used as a multifunction radar. Modern radars are, therefore, multifunction radars.

Saab AB (Sweden) offers portable 3D radar for short-range air surveillance. Giraffe 1X is a lightweight 3D radar, which can be integrated on multiple mobile platforms and can be used to track drones and provide a warning against incoming rocket, artillery, and mortar rounds. The radar is capable of classifying 100 different targets simultaneously.

In September 2021, Hensoldt AG (Germany) was awarded a contract to supply the TRS-3D naval radar to the Norwegian Defence Material Agency. This radar is equipped with the latest solid-state technology and signal processing software. It is used by the

Norwegian Coast Guard.

“Europe: The largest contributing region in the radar systems market.”

Europe is the largest market for radar systems in terms of demand as well as presence of key radar systems manufacturers. The region accounted for a total share of 33.8% of the global Radar systems market in 2020. Europe has many countries that invest a good amount of money in defense infrastructure. This results in a high requirement of radar systems in the Europe.

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), Kongsberg (Norway), Aselsan AS (Turkey), and General Dynamics (US) are some of the leading players operating in the radar systems market report.

Research Coverage

The study covers the radar systems 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 radar systems market and its segments. This study is also expected to provide region wise information about the end use, and wherein radar systems 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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*Details on Business Overview, Products Offered, Recent Developments, MnM View, Right to win, Strategic choices made, Weaknesses and competitive threats might not be captured in case of unlisted companies.

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