

Surface Radars Market by Platform (Critical Infrastructure, Vehicle-Mounted, Shipborne, Unmanned Surface Vehicles), Application (Surveillance, Air-Defense, Perimeter Security, Battlefield ISR), Frequency Band, Dimension - Global Forecast to 2029

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Abstracts

The surface radars market is projected to reach USD 22.49 billion by 2029, from USD 17.26 billion in 2024, at a CAGR of 5.4%. The volume of surface radars is projected to grow from 4690 (in Units) in 2024 to 6113 (in Units) by 2029. The market is driven by key factors, including US defense programs to counter threats, a surge in demand due to ongoing conflicts, and global defense expenditure. The development of missile defense systems and the nature of warfare further fuel market growth. However, the market faces challenges from regulations on arms transfers, operational complexities requiring maintenance, and the development costs of missile systems, which can hinder expansion.

“Based on frequency band, X-Band segment is estimated to capture the largest share in the market during the forecast period”

The X-Band frequency segment is likely to capture the largest share in the surface radar market within the forecast period with higher application in both military and commercial domains. X-Band radars are highly accurate and are more sensitive, hence used for missile defense systems, airborne surveillance, and naval radar systems. These are highly used for low-observable objects such as drones, aircraft, and missiles especially in areas with high clutter conditions like urban or coastal regions. The growing geopolitical tensions and the increase in interests in border security also contribute to

high demand for X-Band radars in military applications. However, it is pushed further by the latest radar technologies in the offering, such as Active Electronically Scanned Array that, in turn provides greater power of detection along with tracking capabilities of X-Band radars. Civil application is on the rise in weather monitoring and air traffic control, pushing the market share even higher than the present rate.

“Based on waveform, the Frequency Modulated Continuous Wave (FMCW) segment forecasted to grow at highest CAGR during forecast period ”

The FMCW radar segment is likely to achieve the highest CAGR in the forecast period. Advances made in FMCW radars support real-time target identification with high-resolution imaging, hence igniting their adoption. Consequently, such a type of radar technology is critical for applications where continuous detection and ranging without any interruptions is sought after, including surveillance systems, autonomous vehicles, and air traffic control. FMCW radars are also increasingly used in unmanned systems and anti-drone technology, and for this reason, the role they play is key to modern warfare and counter-terrorist operations. Current interest in more precise tracking and target identification in defense applications gives the demand for FMCW radars a strong boost due to its accuracy advantage and longer range than traditional pulsed radars. Other reasons for this growth relate to the greater incorporation of these products into industrial applications, such as commercial automation and monitoring of safety conditions.

“ The Europe region is estimated to be the largest market during the forecast period”

The Europe region is likely to dominate the surface radar market for the forecast period, driven by several key factors. There are several leading defense contractors such as Thales, BAE Systems, and Leonardo S.p.A located in Europe, which has been investing heavily in the development of the radar system for military and civil applications. This is now compelling European countries to improve their air and missile defense systems as rising geopolitical tensions in the region, including border security concerns, get on their nerves due to NATO-Russia relations. France, Germany, and the UK are among the countries increasing defense spending, and demand for such advanced radar technologies that can offer early warning and real-time surveillance will now be seen increasing. Furthermore, increased concern for the development of smart cities and civil infrastructure in Europe is driving the adoption of radar systems in smart city infrastructure, including applications in road traffic management and weather forecasting, for the protection of critical infrastructure. The collaborative defense programs that are ongoing, such as NATO defense initiatives, also promote market

growth by expanding the deployment of radar systems across various NATO member countries.

In-depth interviews have been conducted with chief executive officers (CEOs), Directors, and other executives from various key organizations operating in the surface radars marketplace.

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– 35%, Europe – 20%, Asia Pacific– 30%, Middle East – 10% and Rest of the World - 5%

include Lockheed Martin Corporation (US), RTX (US), BAE Systems (UK), Northrop Grumman (US), L3Harris Corporation (US), Leonardo S.p.A (Italy), Israel Aerospace Industries (Israel), Thales (France), Saab AB (Sweden), Elbit Systems Ltd. (Israel), and are some of the leading players operating in the surface radars market.

Research Coverage

This research report categorizes the surface radars market by platform, application, range, frequency, dimension, component, waveform, and by Region. The scope of the report covers detailed information regarding the major factors, such as drivers, restraints, challenges, and opportunities, influencing the growth of the surface radars market. A detailed analysis of the key industry players has been done to provide insights into their business overview, products, and services; key strategies; Contracts, partnerships, agreements, new product launches, and recent developments associated with the surface radars market. Competitive analysis of upcoming startups in surface radars market ecosystem is covered in this report.

Key benefits of buying this report: This report will help the market leaders/new entrants in this market with information on the closest approximations of the revenue numbers for the overall surface radars market and its subsegments. The report covers the entire ecosystem of the surface radars market. It 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 will also help stakeholders understand the pulse of the market and provide them with information on key market drivers,

restraints, challenges, and opportunities.

The report provides insights on the following pointers:

Analysis of key Drivers (Focus on enhancing homeland security and border surveillance capabilities, advancements in radar technologies, emergence of modern warfare , requirement for drone detection systems at airports), restraints (Need for substantial R&D funding), opportunities (Increased advancements in Hardware & Software Integration in Radar Technology, increased Compact Radars for Anti-drones application , increasing preference for phased array solid-state radars, development of low-cost and miniaturized radars) and challenges (Extreme weather conditions, Vulnerability of radars to new jamming techniques) influencing the growth of the market.

Product Development/Innovation: Detailed Insights on upcoming technologies, R&D activities, and new products/solutions launched in the market.

Market Development: Comprehensive information about lucrative markets – the report analyses the surface radars market across varied regions

Market Diversification: Exhaustive information about new solutions, recent developments, and investments in the surface radars market

Competitive Assessment: In-depth assessment of market shares, growth strategies, and service offerings of leading players including Lockheed Martin Corporation (US), RTX (US), BAE Systems (UK), Northrop Grumman (US), L3Harris Corporation (US), Leonardo S.p.A (Italy) and among others in the surface radars market.

Contents

1 INTRODUCTION

- 1.1 STUDY OBJECTIVES
- 1.2 MARKET DEFINITION
- 1.3 STUDY SCOPE
 - 1.3.1 MARKET SEGMENTATION
 - 1.3.2 INCLUSIONS AND EXCLUSIONS
- 1.4 YEARS CONSIDERED
- 1.5 CURRENCY CONSIDERED
- 1.6 STAKEHOLDERS

2 RESEARCH METHODOLOGY

- 2.1 RESEARCH DATA
 - 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 Insights from industry experts
 - 2.1.2.3 Breakdown of primary interviews
- 2.2 FACTOR ANALYSIS
 - 2.2.1 INTRODUCTION
 - 2.2.2 DEMAND-SIDE ANALYSIS
 - 2.2.3 SUPPLY-SIDE ANALYSIS
- 2.3 MARKET SIZE ESTIMATION
 - 2.3.1 BOTTOM-UP APPROACH
 - 2.3.2 TOP-DOWN APPROACH
- 2.4 DATA TRIANGULATION
- 2.5 RESEARCH ASSUMPTIONS
- 2.6 RESEARCH LIMITATIONS
- 2.7 RISK ASSESSMENT

3 EXECUTIVE SUMMARY

4 PREMIUM INSIGHTS

4.1 ATTRACTIVE OPPORTUNITIES FOR PLAYERS IN SURFACE RADARS MARKET

Surface Radars Market by Platform (Critical Infrastructure, Vehicle-Mounted, Shipborne, Unmanned Surface Vehic...

- 4.2 SURFACE RADARS MARKET, BY APPLICATION
- 4.3 SURFACE RADARS MARKET, BY COMPONENT
- 4.4 SURFACE RADARS MARKET, BY WAVEFORM
- 4.5 SURFACE RADARS MARKET, BY CRITICAL INFRASTRUCTURE
- 4.6 SURFACE RADARS MARKET, BY REGION

5 MARKET OVERVIEW

5.1 INTRODUCTION

5.2 MARKET DYNAMICS

5.2.1 DRIVERS

- 5.2.1.1 Focus on enhancing homeland security and border surveillance capabilities
- 5.2.1.2 Advancements in radar technologies
- 5.2.1.3 Emergence of modern warfare
- 5.2.1.4 Requirements for drone detection systems at airports
- 5.2.1.5 Enhanced maritime safety and operational efficiency

5.2.2 RESTRAINTS

- 5.2.2.1 Insufficient R&D funding

5.2.3 OPPORTUNITIES

5.2.3.1 Increased advancements in hardware and software integration in radar technology

- 5.2.3.2 Increased use of compact radars for anti-drone applications

- 5.2.3.3 Preference for phased array solid-state radars

- 5.2.3.4 Development of low-cost, miniaturized radars

5.2.4 CHALLENGES

- 5.2.4.1 Extreme weather conditions

- 5.2.4.2 Vulnerability of radars to new jamming techniques

5.3 TRENDS AND DISRUPTIONS IMPACTING CUSTOMER BUSINESS

5.4 ECOSYSTEM ANALYSIS

5.4.1 PROMINENT COMPANIES

5.4.2 PRIVATE AND SMALL ENTERPRISES

5.4.3 END USERS

5.5 VALUE CHAIN ANALYSIS

5.6 PRICING ANALYSIS

5.6.1 INDICATIVE PRICING ANALYSIS, BY PLATFORM

5.7 OPERATIONAL DATA

5.8 TECHNOLOGY ANALYSIS

5.8.1 KEY TECHNOLOGIES

- 5.8.1.1 Gallium nitride semiconductor

- 5.8.1.2 Active electronically scanned array
- 5.8.2 COMPLEMENTARY TECHNOLOGIES
 - 5.8.2.1 Quantum computing
- 5.8.3 ADJACENT TECHNOLOGIES
 - 5.8.3.1 Sensor fusion
 - 5.8.3.2 Photonics and optical technologies
 - 5.8.3.3 Other technologies
- 5.9 TRADE ANALYSIS
 - 5.9.1 IMPORT SCENARIO (HS CODE 8526)
 - 5.9.2 EXPORT SCENARIO (HS CODE 8526)
- 5.10 USE CASE ANALYSIS
 - 5.10.1 INTEGRATION OF ADVANCED RADAR SYSTEMS IN INS VIKRANT TO ENHANCE NAVAL DEFENSE AND SURVEILLANCE
 - 5.10.2 DEPLOYMENT OF LEONARDO'S TMMR TO MEET DEMAND FOR MOBILE RADARS WITH WORLD-CLASS PERFORMANCE
 - 5.10.3 NAVTECH'S RADAR TECHNOLOGY MAINTAINS SAFETY AND EFFICIENCY IN INCREASINGLY COMPLEX AND AUTONOMOUS MARINE ENVIRONMENT
 - 5.10.4 US MISSILE DEFENSE AGENCY AND RAYTHEON MISSILES & DEFENSE COLLABORATED TO REPLACE COOLING SYSTEM OF SEA-BASED X-BAND RADAR (SBX) WITH NEW, ENVIRONMENTALLY FRIENDLY COMPONENTS
- 5.11 KEY CONFERENCES & EVENTS, 2025
- 5.12 REGULATORY LANDSCAPE
- 5.13 KEY STAKEHOLDERS & BUYING CRITERIA
 - 5.13.1 KEY STAKEHOLDERS IN BUYING PROCESS
 - 5.13.2 BUYING CRITERIA
- 5.14 TECHNOLOGY ROADMAP
- 5.15 TOTAL COST OF OWNERSHIP
- 5.16 BILL OF MATERIALS
- 5.17 SURFACE RADARS MARKET: BUSINESS MODELS
- 5.18 INVESTMENT AND FUNDING SCENARIO
- 5.19 MACROECONOMIC OUTLOOK
 - 5.19.1 INTRODUCTION
 - 5.19.2 NORTH AMERICA
 - 5.19.3 EUROPE
 - 5.19.4 ASIA PACIFIC
 - 5.19.5 MIDDLE EAST
 - 5.19.6 ROW

6 INDUSTRY TRENDS

6.1 INTRODUCTION

6.2 TECHNOLOGY TRENDS

6.2.1 SOFTWARE-DEFINED RADARS

6.2.2 MULTIPLE-INPUT AND MULTIPLE-OUTPUT (MIMO)

6.2.3 INVERSE SYNTHETIC APERTURE RADARS

6.2.4 QUANTUM RADARS

6.3 IMPACT OF MEGATRENDS

6.3.1 ADVENT OF INTERNET OF THINGS

6.3.2 SHIFT IN GLOBAL ECONOMIC POWER

6.3.3 DEVELOPMENT OF ANTENNAS IN RADAR SYSTEMS

6.4 SUPPLY CHAIN ANALYSIS

6.5 IMPACT OF AI ON SURFACE RADARS MARKET

6.5.1 INTRODUCTION

6.5.2 ADOPTION OF AI IN MILITARY BY TOP COUNTRIES

6.5.3 IMPACT OF AI ON DEFENSE: USE CASES

6.5.4 IMPACT OF AI ON SURFACE RADARS MARKET

6.6 PATENT ANALYSIS

7 SURFACE RADARS MARKET, BY PLATFORM

7.1 INTRODUCTION

7.2 CRITICAL INFRASTRUCTURE

7.2.1 MODERNIZATION OF CRITICAL INFRASTRUCTURE TO LEAD TO INCREASED DEMAND FOR RADAR SYSTEMS

7.2.2 AIRPORTS

7.2.3 SEAPORTS

7.2.4 POWER PLANTS

7.2.5 MILITARY BASES & COMMAND CENTRES

7.2.6 OIL & GAS PRODUCTION SITES

7.3 VEHICLE-MOUNTED

7.3.1 NEED FOR WIDE SURVEILLANCE COVERAGE TO DRIVE DEMAND

7.3.2 MILITARY

7.3.3 COMMERCIAL

7.4 SHIPBORNE

7.4.1 INCREASE IN ILLEGAL MARITIME ACTIVITIES TO DRIVE DEMAND FOR SHIPBORNE RADAR SYSTEMS

7.4.2 MILITARY

7.4.3 COMMERCIAL

7.5 UNMANNED SURFACE VEHICLES

7.5.1 NEED FOR ADVANCED SOLUTIONS TO TRACK SECURITY THREATS TO SPUR GROWTH

7.5.2 MILITARY

7.5.3 COMMERCIAL

7.6 OTHER PLATFORMS

8 SURFACE RADARS MARKET, BY COMPONENT

8.1 INTRODUCTION

8.2 ANTENNAS

8.2.1 ADVANCED COMMUNICATION NEEDS AND MODERN WARFARE REQUIREMENTS TO DRIVE DEMAND FOR ANTENNAS

8.2.2 PARABOLIC REFLECTOR ANTENNAS

8.2.3 SLOTTED WAVEGUIDE ANTENNAS

8.2.4 PHASED ARRAY ANTENNAS

8.2.5 MULTIPLE-INPUT AND MULTIPLE-OUTPUT (MIMO)

8.2.6 ACTIVE SCANNED ARRAY ANTENNAS

8.2.7 PASSIVE SCANNED ARRAY ANTENNAS

8.3 TRANSMITTERS

8.3.1 INCREASED DEMAND FOR COMPLEX MILITARY COMMUNICATION INFRASTRUCTURE TO DRIVE GROWTH

8.3.2 MICROWAVE TUBE-BASED TRANSMITTERS

8.3.3 SOLID-STATE ELECTRONIC TRANSMITTERS

8.4 RECEIVERS

8.4.1 RADAR RECEIVERS USE POWER AMPLIFIERS FOR SIGNAL AMPLIFICATION

8.4.2 ANALOG

8.4.3 DIGITAL

8.5 POWER AMPLIFIERS

8.5.1 POWER AMPLIFIERS EMPLOY ELECTRONIC SYSTEM DESIGN TO FOCUS ON EFFICIENCY AND LINEARITY

8.5.2 TRAVELING WAVE TUBE AMPLIFIERS

8.5.3 SOLID-STATE POWER AMPLIFIERS

8.5.3.1 Gallium Arsenide (GaAs)

8.5.3.2 Gallium Nitride (GaN)

8.5.3.3 Silicon carbide

8.5.4 GALLIUM NITRIDE POWER AMPLIFIERS

8.6 DUPLEXERS

8.6.1 DUPLEXERS ARE REQUIRED WHEN SINGLE ANTENNA IS USED TO TRANSMIT AND RECEIVE SIGNALS

8.6.2 BRANCH-TYPE DUPLEXERS

8.6.3 BALANCED-TYPE DUPLEXERS

8.6.4 CIRCULATOR DUPLEXERS

8.7 DIGITAL SIGNAL PROCESSORS

8.7.1 NEED FOR ADVANCED, HIGH-END PROCESSORS TO DRIVE DEMAND FOR DIGITAL SIGNAL PROCESSORS

8.8 GRAPHICAL USER INTERFACES

8.8.1 GRAPHICAL USER INTERFACES ALLOW USERS TO COMMUNICATE USING GRAPHICAL ICONS AND TEXT-BASED INTERFACES WITH ELECTRONIC DEVICES

8.8.2 CONTROL PANELS

8.8.3 GRAPHIC PANELS

8.8.4 DISPLAYS

8.9 STABILIZATION SYSTEMS

8.9.1 STABILIZATION SYSTEMS ENHANCE MILITARY MOBILITY AND EFFECTIVENESS OF COMBATS

8.10 OTHER COMPONENTS

9 SURFACE RADARS MARKET, BY WAVEFORM

9.1 INTRODUCTION

9.2 FREQUENCY-MODULATED CONTINUOUS WAVE (FMCW)

9.2.1 NEED FOR VERSATILITY AND ACCURACY IN COVERT OPERATIONS TO DRIVE DEMAND

9.3 DOPPLER

9.3.1 DEMAND FOR ADVANCED WEATHER PREDICTION TECHNOLOGIES TO BOOST DEMAND FOR DOPPLER RADARS

9.3.2 CONVENTIONAL DOPPLER RADARS

9.3.3 PULSE DOPPLER RADARS

10 SURFACE RADARS MARKET, BY FREQUENCY BAND

10.1 INTRODUCTION

10.2 HF/UHF/VHF-BAND

10.2.1 HF/UHF/VHF-BAND RADARS FACILITATE LONG-RANGE SURVEILLANCE AND TRACKING

10.3 L-BAND

10.3.1 L-BAND RADARS ARE WIDELY USED IN SPACE-BASED PLATFORMS

10.4 S-BAND

10.4.1 S-BAND RADARS ARE USED FOR MODERATE-RANGE SURVEILLANCE

10.5 C-BAND

10.5.1 S-BAND RADARS PROVIDE ROBUST SURVEILLANCE AND PRECISE TARGET-TRACKING CAPABILITIES

10.6 X-BAND

10.6.1 X-BAND RADARS CAN DETECT HIDDEN WEAPONS AND EXPLORE SPACE ENVIRONMENT DURING MAPPING

10.7 KU-BAND

10.7.1 KU-BAND RADARS PROVIDE HIGH-RESOLUTION IMAGING WITH ROBUST SIGNAL

10.8 KA-BAND

10.8.1 KA-BAND RADARS DELIVER HIGH THROUGHPUT BEAMS AND HIGH BANDWIDTH COMMUNICATION

10.9 MULTI-BAND

10.9.1 GROWING DEMAND FOR BETTER RADAR SIGNALS TO BOOST ADOPTION OF MULTI-BAND RADARS

11 SURFACE RADARS MARKET, BY RANGE

11.1 INTRODUCTION

11.2 LONG RANGE

11.2.1 NEED FOR LONG-DISTANCE TRACKING AND ACCURATE LOCATION TO DRIVE MARKET

11.3 MEDIUM RANGE

11.3.1 MEDIUM-RANGE RADARS ENHANCE BORDER SECURITY AND WEAPON GUIDANCE

11.4 SHORT RANGE

11.4.1 SHORT-RANGE RADARS ARE USED IN COMMERCIAL APPLICATIONS OR MAN-PORTABLE RECONNAISSANCE MISSIONS

11.5 VERY SHORT RANGE

11.5.1 VERY SHORT-RANGE RADARS ARE EFFECTIVE IN TRACKING FLYING THREATS

12 SURFACE RADARS MARKET, BY APPLICATION

12.1 INTRODUCTION

12.2 SURVEILLANCE

12.2.1 SURVEILLANCE RADARS CAN TRACK AND IDENTIFY AIRCRAFT FLYING LOW AND AT GREAT DISTANCE

12.3 AIR DEFENSE

12.3.1 GROWING NUMBER AND SOPHISTICATION OF THREATS TO BOOST GROWTH

12.4 PERIMETER SECURITY

12.4.1 INCREASED INVESTMENTS IN BORDER SECURITY OPERATIONS TO ENCOURAGE MARKET EXPANSION

12.5 BATTLEFIELD ISR

12.5.1 RADAR SYSTEMS PROVIDE REAL-TIME DATA ON ENEMY MOVEMENTS, ALLOWING MILITARY FORCES TO MAKE INFORMED DECISIONS

12.6 OTHER APPLICATIONS

13 SURFACE RADARS MARKET, BY DIMENSION

13.1 INTRODUCTION

13.2 2D

13.2.1 2D RADARS ARE WIDELY ACCEPTED FOR TERRESTRIAL, NAVAL, AND AIRBORNE SURVEILLANCE

13.3 3D

13.3.1 ENHANCED CAPABILITIES OF 3D RADARS TO DRIVE THEIR DEMAND AND ADOPTION

13.4 4D

13.4.1 4D RADARS ARE USED FOR AUTONOMOUS TACTICAL SURVEILLANCE APPLICATIONS TO GENERATE HIGH-RESOLUTION TARGET SIGNALS

14 SURFACE RADARS MARKET, BY TECHNOLOGY

14.1 SOFTWARE-DEFINED RADARS

14.1.1 SOFTWARE-DEFINED RADARS OFFER ENHANCED DEFENSE AGAINST LIMITED, LOW-ALTITUDE AIR THREATS

14.1.2 MULTIPLE-INPUT AND MULTIPLE-OUTPUT

14.1.3 PHASED ARRAY RADARS

14.1.3.1 Active electronically scanned arrays

14.1.3.2 Passive electronically scanned arrays

14.2 CONVENTIONAL RADARS

14.2.1 CONVENTIONAL RADARS ARE IMMUNE TO JAMMING, DETECTION, AND EXTERNAL INTERFERENCE

14.3 QUANTUM RADARS

14.3.1 QUANTUM RADARS PERFORM ACCURATE RADAR DETECTION AND STRENGTHEN DEFENSE

15 SURFACE RADARS MARKET, BY REGION

15.1 INTRODUCTION

15.2 NORTH AMERICA

15.2.1 PESTLE ANALYSIS

15.2.2 US

15.2.2.1 Need for strategic advancements in defense technologies to drive market

15.2.3 CANADA

15.2.3.1 Focus on improving surveillance radar technology to drive market

15.3 EUROPE

15.3.1 PESTLE ANALYSIS

15.3.2 UK

15.3.2.1 Rapid growth in military expenditure and increase in special surveillance and missile defense programs to drive market

15.3.3 GERMANY

15.3.3.1 Advanced technological capabilities and robust defense industry to drive market

15.3.4 FRANCE

15.3.4.1 Rising demand for surveillance systems to fuel market growth

15.3.5 ITALY

15.3.5.1 Focus on defense modernization and technological advancements

15.3.6 REST OF EUROPE

15.4 ASIA PACIFIC

15.4.1 PESTLE ANALYSIS

15.4.2 INDIA

15.4.2.1 Increased procurement of defense systems to drive market

15.4.3 JAPAN

15.4.3.1 Heightened security concerns to drive popularity of surface radars

15.4.4 SOUTH KOREA

15.4.4.1 Strategic investments and advancements in radar technology to fuel growth

15.4.5 AUSTRALIA

15.4.5.1 Emphasis on upgrading 737-based E-7 radar jets to indicate advancements in surface radars market

15.4.6 REST OF ASIA PACIFIC

15.5 MIDDLE EAST

15.5.1 PESTLE ANALYSIS

15.5.2 GCC COUNTRIES

15.5.2.1 Saudi Arabia

15.5.2.1.1 Government initiatives such as 'Vision 2030' to drive market

15.5.2.2 UAE

15.5.2.2.1 Increasing ballistic missile attacks from neighboring countries to drive market

15.5.3 TURKEY

15.5.3.1 Increasing focus on modernizing defense capabilities to drive market

15.5.4 ISRAEL

15.5.4.1 Increasing domestic production capabilities and rise in government investments in defense sector to drive market

15.6 REST OF THE WORLD

15.6.1 PESTLE ANALYSIS

15.6.2 LATIN AMERICA

15.6.2.1 Rigorous efforts to strengthen defense forces to drive market

15.6.3 AFRICA

15.6.3.1 Focus on small CubeSats for space-based surveillance to drive market

16 COMPETITIVE LANDSCAPE

16.1 INTRODUCTION

16.2 KEY PLAYER STRATEGIES/RIGHT TO WIN

16.3 MARKET SHARE ANALYSIS

16.4 REVENUE ANALYSIS

16.5 BRAND COMPARISON

16.6 COMPANY EVALUATION MATRIX: KEY PLAYERS, 2023

16.6.1 STARS

16.6.2 EMERGING LEADERS

16.6.3 PERVASIVE PLAYERS

16.6.4 PARTICIPANTS

16.6.5 COMPANY FOOTPRINT: KEY PLAYERS

16.7 COMPANY VALUATION AND FINANCIAL METRICS

16.8 COMPANY EVALUATION MATRIX: STARTUPS/SMES, 2023

16.8.1 PROGRESSIVE COMPANIES

16.8.2 RESPONSIVE COMPANIES

16.8.3 DYNAMIC COMPANIES

16.8.4 STARTING BLOCKS

16.8.5 COMPETITIVE BENCHMARKING: STARTUPS/SMES, 2023

16.9 COMPETITIVE SCENARIO

16.9.1 MARKET EVALUATION FRAMEWORK

16.9.2 PRODUCT LAUNCHES/DEVELOPMENTS

16.9.3 DEALS

16.9.4 OTHER DEVELOPMENTS

17 COMPANY PROFILES

17.1 KEY PLAYERS

17.1.1 RTX

17.1.1.1 Business overview

17.1.1.2 Products/Solutions/Services offered

17.1.1.3 Recent developments

17.1.1.3.1 Other developments

17.1.1.4 MnM view

17.1.1.4.1 Right to win

17.1.1.4.2 Strategic choices

17.1.1.4.3 Weaknesses and competitive threats

17.1.2 LOCKHEED MARTIN CORPORATION

17.1.2.1 Business overview

17.1.2.2 Products/Solutions/Services offered

17.1.2.3 Recent developments

17.1.2.3.1 Product launches

17.1.2.3.2 Deals

17.1.2.3.3 Other developments

17.1.2.4 MnM view

17.1.2.4.1 Right to win

17.1.2.4.2 Strategic choices

17.1.2.4.3 Weaknesses and competitive threats

17.1.3 L3HARRIS TECHNOLOGIES, INC.

17.1.3.1 Business overview

17.1.3.2 Products/Solutions/Services offered

17.1.3.3 Recent developments

17.1.3.3.1 Deals

17.1.3.3.2 Other developments

17.1.3.4 MnM view

17.1.3.4.1 Right to win

17.1.3.4.2 Strategic choices

17.1.3.4.3 Weaknesses & competitive threats

17.1.4 THALES

- 17.1.4.1 Business overview
- 17.1.4.2 Products/Solutions/Services offered
- 17.1.4.3 Recent developments
 - 17.1.4.3.1 Product launches
 - 17.1.4.3.2 Other developments
- 17.1.4.4 MnM view
 - 17.1.4.4.1 Right to win
 - 17.1.4.4.2 Strategic choices
 - 17.1.4.4.3 Weaknesses and competitive threats

17.1.5 ISRAEL AEROSPACE INDUSTRIES

- 17.1.5.1 Business overview
- 17.1.5.2 Products/Solutions/Services offered
- 17.1.5.3 Recent developments
 - 17.1.5.3.1 Product launches
 - 17.1.5.3.2 Deals
 - 17.1.5.3.3 Other developments
- 17.1.5.4 MnM view
 - 17.1.5.4.1 Right to win
 - 17.1.5.4.2 Strategic choices
 - 17.1.5.4.3 Weaknesses and competitive threats

17.1.6 LEONARDO S.P.A.

- 17.1.6.1 Business overview
- 17.1.6.2 Products/Solutions/Services offered
- 17.1.6.3 Recent developments
 - 17.1.6.3.1 Deals
 - 17.1.6.3.2 Other developments

17.1.7 BAE SYSTEMS

- 17.1.7.1 Business overview
- 17.1.7.2 Products/Solutions/Services offered
- 17.1.7.3 Recent developments
 - 17.1.7.3.1 Product launches
 - 17.1.7.3.2 Deals
 - 17.1.7.3.3 Other developments

17.1.8 NORTHROP GRUMMAN

- 17.1.8.1 Business overview
- 17.1.8.2 Products/Solutions/Services offered
- 17.1.8.3 Recent developments
 - 17.1.8.3.1 Product launches

- 17.1.8.3.2 Other developments
- 17.1.9 ELBIT SYSTEMS LTD.
 - 17.1.9.1 Business overview
 - 17.1.9.2 Products/Solutions/Services offered
 - 17.1.9.3 Recent developments
 - 17.1.9.3.1 Product launches
 - 17.1.9.3.2 Deals
 - 17.1.9.3.3 Other developments
- 17.1.10 BHARAT ELECTRONICS LIMITED
 - 17.1.10.1 Business overview
 - 17.1.10.2 Products/Solutions/Services offered
 - 17.1.10.3 Recent developments
 - 17.1.10.3.1 Product launches
 - 17.1.10.3.2 Other developments
- 17.1.11 INDRA
 - 17.1.11.1 Business overview
 - 17.1.11.2 Products/Solutions/Services offered
 - 17.1.11.3 Recent developments
 - 17.1.11.3.1 Product launches
 - 17.1.11.3.2 Deals
 - 17.1.11.3.3 Other developments
- 17.1.12 ASELSAN A.?.
 - 17.1.12.1 Business overview
 - 17.1.12.2 Products/Solutions/Services offered
 - 17.1.12.3 Recent developments
 - 17.1.12.3.1 Product launches
 - 17.1.12.3.2 Deals
 - 17.1.12.3.3 Other developments
- 17.1.13 SAAB
 - 17.1.13.1 Business overview
 - 17.1.13.2 Products/Solutions/Services offered
 - 17.1.13.3 Recent developments
 - 17.1.13.3.1 Other developments
- 17.1.14 TELEDYNE FLIR LLC
 - 17.1.14.1 Business overview
 - 17.1.14.2 Products/Solutions/Services offered
 - 17.1.14.3 Recent developments
 - 17.1.14.3.1 Product launches
 - 17.1.14.3.2 Deals

17.1.15 HENSOLDT

17.1.15.1 Business overview

17.1.15.2 Products/Solutions/Services offered

17.1.15.3 Recent developments

17.1.15.3.1 Product launches

17.1.15.3.2 Other developments

17.2 OTHER PLAYERS

17.2.1 BLIGHTER SURVEILLANCE SYSTEMS LIMITED

17.2.2 DETECT, INC.

17.2.3 TERMA

17.2.4 ACCIPITER RADAR

17.2.5 PIERSIGHT

17.2.6 REUTECH RADAR SYSTEMS

17.2.7 SRC INC.

17.2.8 EASAT RADAR SYSTEMS LIMITED

17.2.9 ECHODYNE CORP.

17.2.10 MAGOS SYSTEMS

18 APPENDIX

18.1 DISCUSSION GUIDE

18.2 ANNEXURE A: DEFENSE PROGRAM MAPPING

18.3 ANNEXURE B: OTHER MAPPED COMPANIES

18.4 KNOWLEDGESTORE: MARKETSANDMARKETS' SUBSCRIPTION PORTAL

18.5 CUSTOMIZATION OPTIONS

18.6 RELATED REPORTS

18.7 AUTHOR DETAILS

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