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# Asia-Pacific ISR - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts (2024 - 2029)

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## Abstracts

The Asia-Pacific Intelligence Surveillance And Reconnaissance Market size is estimated at USD 3.80 billion in 2024, and is expected to reach USD 4.54 billion by 2029, growing at a CAGR of 3.65% during the forecast period (2024-2029).

Key Highlights

The Asia-Pacific intelligence surveillance and reconnaissance market is expected to grow rapidly because the countries in the region are investing significant resources to enhance their current defense capabilities. The increasing focus on miniaturization and improving the accuracy of the intelligence surveillance reconnaissance (ISR) systems and payloads are propelling their utilization across all platforms. Their high reliability and availability at low costs have propelled militaries to procure these systems in abundance. As a new line of threats emerges, these systems have become integral to military preparedness due to their utility.

Increased focus on new technologies like long-endurance UAVs made interoperability between platforms, such as satellites and drones, and among different domains more of a challenge due to limited availability on the frequency spectrum and onboard processors. The ability of these systems to collect and transmit actionable data in real-time is also overbearing for the military.

The growing adoption of unmanned ISR platforms, such as drones, is a prominent trend in the industry. Big Data integration is also expected to optimize ISR outcomes by rapidly visualizing the result of the fusion of enormous quantities of data collected by sensors, providing accurate and timely intelligence analysis.

## APAC Intelligence Surveillance & Reconnaissance Market Trends

### Air Segment to Dominate Market Share During the Forecast Period

The aerial platforms provide extensive ISR capabilities. This represents the first additional capability required by a combat decision-maker to make informed decisions during a crisis or contingency situation. Both crewed (reconnaissance aircraft and airborne early warning aircraft) and unmanned aerial ISR systems are used to synchronize the planning and operation of the components of this ISR enterprise, including analysis and production capabilities, to enable current and future operations.

Several countries in the region are robustly investing in upgrading their airborne capabilities through new procurement or modernization of their existing fleet. As of October 2023, South Korea had planned to acquire more AEW&C aircraft to bolster its capabilities in airborne surveillance and intelligence-gathering domains. It was reported that the country is planning to procure four additional Baekdu reconnaissance aircraft during 2022-2026 to replace the aging four Hawker 800 aircraft.

Similarly, China also unveiled its new aircraft to counter any electronic warfare threats to the country. For instance, in Jan 2022, China's J-16D aircraft first appeared at the island's air defense zone. This jet is equipped with electronic interface functions and is combat-ready. The airborne intelligence, surveillance, and reconnaissance sectors are expected to grow significantly over the forecast period.

### India is Anticipated to Witness Highest Growth During the Forecast Period

India has strained relations with its neighboring countries, Pakistan and China. This situation demands the possession of a persistent ISR capability along its land-based borders. Also, with the emergence of the world's major energy and trade routes through the Indian Ocean, several maritime security threats, such as piracy, maritime terrorism, illegal, unreported, and unregulated (IUU) fishing, illegal immigration, and smuggling of arms and drugs, have emerged over the years. These issues, along with the growing focus of China on the Indian Ocean region, demand continuous maritime patrol and surveillance.

From the communications perspective, the Army is targeting an increased number of military satellites, hinting at a possible purchase of related technology. For instance, in

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March 2022, the Defence Acquisition Council cleared the first step of procurement for indigenously designed and built GSAT 7B, a multiband, military-grade satellite for the Army.

Furthermore, the increasing technology and electronic warfare have been driving the demand for technologies to effectively tackle electronic warfare. In line with this, new developments have been occurring in the Army to keep up with global technology. For instance, in March 2022, the Defence Ministry of India signed a partnership with Bharat Electronics Limited (BEL) to supply an Advanced Electronic Warfare suite for the Indian Air Force fighter jets. The contract was signed between the Ministry of Defense and BEL. Several such developments across the country and the country’s proximity to other potential threats make it essential for the armed forces to expand their capabilities and, consequently, drive the market demand towards significant growth rates during the forecast period.

APAC Intelligence Surveillance & Reconnaissance Industry Overview

The Asia-Pacific intelligence surveillance and reconnaissance market exhibits a semi-consolidated nature, with major players including BAE Systems plc, General Dynamics Corporation, The Boeing Company, Elbit Systems Ltd., and L3Harris Technologies, Inc. The region's ISR technology is continuously evolving with innovative advancements aimed at safeguarding the interests of the armed forces. Notably, the government favors local manufacturers, providing them with preferences for the development and testing of cutting-edge technologies.

Anticipated market competition is set to intensify as companies ramp up investments in new product development to bolster support for ISR missions conducted by armed forces in the region. A key strategic focus for market players involves innovating new and advanced Command, Control, Communications, Computers, Intelligence, Surveillance, and Reconnaissance (C4ISR) systems to enhance their market share. This heightened competition is further driven by increased investments in the development of products tailored to the specific ISR needs of armed forces in the Asia-Pacific region.

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