

# **ISR Video Solution Global Market Insights 2025, Analysis and Forecast to 2030, by Market Participants, Regions, Technology, Application**

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## **Abstracts**

### **ISR Video Solution Market Summary**

#### **Introduction**

ISR (Intelligence, Surveillance, Reconnaissance) Video Solutions are advanced systems that process and transmit real-time video for military and security applications. They enable situational awareness through high-definition imagery and secure connectivity. The market is characterized by its role in defense and homeland security, driven by rising geopolitical tensions, UAV adoption, and cybersecurity needs. Trends include AI-enhanced video processing, low-latency streaming, and ruggedized systems, with growing demand in emerging markets due to security investments.

#### **Market Size and Growth Forecast**

The global ISR Video Solution market was valued at USD 13.1–18.9 billion in 2024, with an estimated CAGR of 6.5%–8.5% from 2025 to 2030, propelled by defense modernization and security needs.

#### **Regional Analysis**

North America grows at 6.0%–8.0%; the U.S. leads due to defense spending, with trends focusing on AI processing.

Europe achieves 6.3%–8.3% growth; the UK and France drive demand through security, emphasizing low-latency streaming.

Asia Pacific records 7.0%–9.0% growth; China and India are key markets, with trends toward ruggedized systems.

Rest of the World grows at 5.8%–7.8%; Brazil and South Africa show potential, with trends centering on UAV integration.

### Application Analysis

Military Department expands at 6.8%–8.8%; it drives defense operations, with trends favoring AI-enhanced systems.

Security Department grows at 6.3%–8.3%; it supports homeland security, emphasizing secure streaming.

### Key Market Players

Haivision, based in Montreal, Canada, is a leader in video streaming, known for low-latency solutions. Haivision is developing AI processing and targeting Asia.

VITEC, headquartered in Paris, France, offers ruggedized video systems, emphasizing reliability. VITEC is targeting Europe.

Crystal Group, from Hiawatha, Iowa, USA, provides secure video solutions, focusing on durability. Crystal is targeting Latin America.

Planet Communications, based in Bangkok, Thailand, supplies ISR systems, known for scalability. Planet is targeting India.

Cornet Technology, from Springfield, Virginia, USA, offers military video solutions, emphasizing precision. Cornet is targeting Africa.

Viasat, headquartered in Carlsbad, California, USA, provides secure streaming, focusing on connectivity. Viasat is targeting China.

Antrica, based in Bracknell, UK, supplies compact video systems, emphasizing affordability. Antrica is targeting Southeast Asia.

### Porter's Five Forces Analysis

The threat of new entrants is moderate; high R&D and security clearances deter entry, but defense demand attracts niche players.

The threat of substitutes is low; alternative surveillance lacks ISR video's real-time precision.

Buyer power is moderate; governments demand performance, but large contracts negotiate pricing.

Supplier power is low; video components are widely available, reducing supplier leverage.

Competitive rivalry is high; firms differentiate through AI processing, low-latency, and ruggedized designs.

## Market Opportunities and Challenges

### Opportunities

Defense modernization drives ISR video adoption.

AI-enhanced and low-latency systems enhance market growth.

Emerging markets offer expansion as security grows in Asia and Africa.

### Challenges

High costs of advanced systems limit adoption in smaller nations.

Cybersecurity threats increase development costs.

Intense competition pressures pricing for branded solutions.

## Growth Trend Analysis

The ISR Video Solution market is growing robustly, driven by defense and security

needs. Lockheed Martin's acquisition of an ISR and tactical systems business on April 24, 2025, strengthens its portfolio. The UK's acquisition of classified ISR UAVs on March 27, 2025, boosts demand. General Atomics' acquisition of North Point Defense on March 4, 2025, enhances SIGINT. Haivision's Kraken processor release on July 25, 2024, and Viasat's Air-IQ launch on July 23, 2024, align with a projected CAGR of 6.5%–8.5% through 2030.

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