

Air Combat Maneuvering Instrumentation (ACMI) System Market Forecasts to 2032 – Global Analysis by Type (Ground Exploitation (Debriefing) Station (GES) and Airborne Instrumentation System (AIS)), System, Deployment, Scale of Platform, Application and By Geography

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Abstracts

According to Statistics MRC, the Global Air Combat Maneuvering Instrumentation (ACMI) Market is accounted for \$1.5 billion in 2025 and is expected to reach \$2.7 billion by 2032 growing at a CAGR of 8.6% during the forecast period. Air Combat Maneuvering Instrumentation (ACMI) is a system used to track, record, and analyze aerial combat training exercises in real-time. It provides precise data on aircraft positions, velocities, weapon engagements, and pilot maneuvers, enhancing training effectiveness. ACMI systems consist of airborne pods, ground-based tracking stations, and debriefing software to assess pilot performance and mission outcomes. These systems help identify strengths and weaknesses in combat tactics, enabling pilots to improve their skills.

Market Dynamics:

Driver:

Increasing Military Modernization Programs

The global Air Combat Maneuvering Instrumentation (ACMI) is expanding due to the increasing number of military modernization initiatives around the world. To improve pilot combat preparedness, and mission performance, nations are spending money on

cutting-edge training technologies. These improvements enhance the simulation capabilities, and real-time data analytics of ACMI systems. Demand is also being driven by improvements in defense aviation technology and growing geopolitical concerns. The ongoing development of state-of-the-art ACMI solutions across international air forces is guaranteed by this modernization trend.

Restraint:

High Initial Investment and Maintenance Costs

The high initial investment and maintenance costs of air combat maneuvering instrumentation (ACMI) systems pose significant challenges to market growth. These expenses limit adoption, particularly for budget-constrained defense agencies and smaller air forces. High costs also hinder upgrades and modernization efforts, delaying the integration of advanced technologies. Additionally, maintenance expenses increase operational costs, making ACMI systems less attractive, and thereby slowing market expansion.

Opportunity:

Rising Demand for Realistic Combat Training

The rising demand for realistic combat training is significantly driving the global air combat maneuvering instrumentation (ACMI) market. Modern air forces seek advanced ACMI systems to enhance pilot proficiency, mission readiness, and tactical effectiveness. Increasing geopolitical tensions and evolving warfare strategies further fuel investments in high-fidelity training solutions. The integration of AI, augmented reality, and data analytics in ACMI systems enhances simulation accuracy, boosting market growth. As nations prioritize combat preparedness, the ACMI market continues to expand, fostering innovation and technological advancements.

Threat:

Complex Integration with Legacy Systems

The complex integration of Air Combat Maneuvering Instrumentation (ACMI) systems with legacy infrastructure poses significant challenges, hindering market growth. Compatibility issues, outdated protocols, and high adaptation costs slow deployment and limit operational efficiency. Integration complexities often require extensive

customization, increasing time and expenses. Additionally, cybersecurity risks and data inconsistencies further obstruct seamless interoperability. These barriers discourage adoption and restraining the ACMI market's expansion.

Covid-19 Impact:

The COVID-19 pandemic disrupted the Air Combat Maneuvering Instrumentation (ACMI) Market through supply chain delays, budget reallocations, and reduced defense procurement. Training exercises were postponed, impacting system deployments. However, as defense priorities remained strong, nations adapted by accelerating digital simulation and remote training. Post-pandemic recovery has driven renewed investments, ensuring modernization and resilience in air combat training programs worldwide.

The mission rehearsal & planning segment is expected to be the largest during the forecast period

The mission rehearsal & planning segment is expected to account for the largest market share during the forecast period as advanced simulation and pre-mission planning improve pilot decision-making, reducing risks during live exercises. Integration with ACMI systems enables realistic scenario-based training, optimizing resource utilization and reducing costs. As air forces worldwide emphasize precision and tactical superiority, the demand for mission planning solutions grows, fueling ACMI market expansion and technological advancements in training and combat evaluation.

The telemetry systems segment is expected to have the highest CAGR during the forecast period

Over the forecast period, the telemetry systems segment is predicted to witness the highest growth rate owing to enhanced situational awareness, and precise performance analysis. These systems facilitate seamless communication between aircraft and ground stations, improving training effectiveness and mission debriefing. With advancements in digital telemetry, ACMI systems now offer higher data accuracy, reduced latency, and integration with AI-driven analytics. This growing demand for sophisticated telemetry solutions is fueling market expansion and technological innovation worldwide.

Region with largest share:

During the forecast period, the North America region is expected to hold the largest market share because cutting-edge simulation and real-time data analytics, ACMI systems improve operational efficiency and strategic decision-making. Growing defense budgets and technological innovation are fueling market expansion, supporting air force modernization. These systems provide unparalleled situational awareness, ensuring pilots are better equipped for real-world scenarios, ultimately strengthening national security and defense capabilities across North America.

Region with highest CAGR:

Over the forecast period, the Asia Pacific region is anticipated to exhibit the highest CAGR due to advancements in the region by enhancing military training, improving combat readiness, and strengthening air force capabilities. With rising defense budgets and technological adoption, ACMI systems enable realistic, data-driven pilot training, ensuring superior air combat proficiency. Nations like India, China, and Japan are investing in ACMI to modernize their air forces. This growth fosters regional security, strengthens defense collaborations, and supports the aerospace industry's expansion in Asia-Pacific.

Key players in the market

Some of the key players in Air Combat Maneuvering Instrumentation (ACMI) Market include Aerotree Defence & Services Sdn. Bhd., BAE Systems, Boeing Company, ComAvia Systems Technologies Pvt. Ltd., Cubic Corporation, DRS Technologies, Inc., Elbit Systems, General Dynamics Corporation, Halbit Avionics Pvt. Ltd., Hensoldt AG, Kongsberg Defence & Aerospace, L3Harris Technologies, Leonardo S.p.A., Lockheed Martin Corporation, Northrop Grumman Corporation, Raytheon Technologies Corporation, Rheinmetall AG, Saab AB, Samtel Avionics and Thales Group.

Key Developments:

In November 2024, National Highways has extended its partnership with BAE Systems. The collaboration aims to address the increasing cyber threats targeting critical national infrastructure, ensuring resilient and secure transport projects.

In September 2024, BAE Systems acquired Kirintec, a UK-based company specializing in cyber and electromagnetic activities (CEMA), this strategic acquisition aims to strengthen BAE Systems' electronic warfare and force protection capabilities, addressing the growing demand for advanced CEMA solutions.

Types Covered:

Ground Exploitation (Debriefing) Station (GES)

Airborne Instrumentation System (AIS)

Systems Covered:

Data Collection Systems

Data Processing & Storage Systems

Telemetry Systems

Ground-Based Tracking & Control Systems

Simulation & Debriefing Systems

Integration & Networking Systems

Maintenance & Support Systems

Deployments Covered:

Fixed Installation

Mobile Deployment

Deployable Pods

Scale of Platforms Covered:

Single Platform

Multi-Platform

Applications Covered:

Airmen Training & Simulation

Tactical Evaluation & Performance Analysis

Mission Rehearsal & Planning

Doctrine Development & Training Concept Evaluation

Research, Development, Testing & Evaluation (RDT&E)

Joint Forces and Coalition Training

Operational Readiness & Mission Planning

Other Applications

Regions Covered:

North America

US

Canada

Mexico

Europe

Germany

UK

Italy

France

Spain

Rest of Europe

Asia Pacific

Japan

China

India

Australia

New Zealand

South Korea

Rest of Asia Pacific

South America

Argentina

Brazil

Chile

Rest of South America

Middle East & Africa

Saudi Arabia

UAE

Qatar

South Africa

Rest of Middle East & Africa

What our report offers:

- Market share assessments for the regional and country-level segments
- Strategic recommendations for the new entrants
- Covers Market data for the years 2024, 2025, 2026, 2028, and 2032
- Market Trends (Drivers, Constraints, Opportunities, Threats, Challenges, Investment Opportunities, and recommendations)
- Strategic recommendations in key business segments based on the market estimations
- Competitive landscaping mapping the key common trends
- Company profiling with detailed strategies, financials, and recent developments
- Supply chain trends mapping the latest technological advancements

Free Customization Offerings:

All the customers of this report will be entitled to receive one of the following free customization options:

Company Profiling

Comprehensive profiling of additional market players (up to 3)

SWOT Analysis of key players (up to 3)

Regional Segmentation

Market estimations, Forecasts and CAGR of any prominent country as per the client's interest (Note: Depends on feasibility check)

Competitive Benchmarking

Benchmarking of key players based on product portfolio, geographical presence, and strategic alliances

Contents

1 EXECUTIVE SUMMARY

2 PREFACE

- 2.1 Abstract
- 2.2 Stake Holders
- 2.3 Research Scope
- 2.4 Research Methodology
 - 2.4.1 Data Mining
 - 2.4.2 Data Analysis
 - 2.4.3 Data Validation
 - 2.4.4 Research Approach
- 2.5 Research Sources
 - 2.5.1 Primary Research Sources
 - 2.5.2 Secondary Research Sources
 - 2.5.3 Assumptions

3 MARKET TREND ANALYSIS

- 3.1 Introduction
- 3.2 Drivers
- 3.3 Restraints
- 3.4 Opportunities
- 3.5 Threats
- 3.6 Application Analysis
- 3.7 Emerging Markets
- 3.8 Impact of Covid-19

4 PORTERS FIVE FORCE ANALYSIS

- 4.1 Bargaining power of suppliers
- 4.2 Bargaining power of buyers
- 4.3 Threat of substitutes
- 4.4 Threat of new entrants
- 4.5 Competitive rivalry

5 GLOBAL AIR COMBAT MANEUVERING INSTRUMENTATION (ACMI) MARKET,

BY TYPE

- 5.1 Introduction
- 5.2 Ground Exploitation (Debriefing) Station (GES)
- 5.3 Airborne Instrumentation System (AIS)

6 GLOBAL AIR COMBAT MANEUVERING INSTRUMENTATION (ACMI) MARKET, BY SYSTEM

- 6.1 Introduction
- 6.2 Data Collection Systems
- 6.3 Data Processing & Storage Systems
- 6.4 Telemetry Systems
- 6.5 Ground-Based Tracking & Control Systems
- 6.6 Simulation & Debriefing Systems
- 6.7 Integration & Networking Systems
- 6.8 Maintenance & Support Systems

7 GLOBAL AIR COMBAT MANEUVERING INSTRUMENTATION (ACMI) MARKET, BY DEPLOYMENT

- 7.1 Introduction
- 7.2 Fixed Installation
- 7.3 Mobile Deployment
- 7.4 Deployable Pods

8 GLOBAL AIR COMBAT MANEUVERING INSTRUMENTATION (ACMI) MARKET, BY SCALE OF PLATFORM

- 8.1 Introduction
- 8.2 Single Platform
- 8.3 Multi-Platform

9 GLOBAL AIR COMBAT MANEUVERING INSTRUMENTATION (ACMI) MARKET, BY APPLICATION

- 9.1 Introduction
- 9.2 Airmen Training & Simulation
- 9.3 Tactical Evaluation & Performance Analysis

- 9.4 Mission Rehearsal & Planning
- 9.5 Doctrine Development & Training Concept Evaluation
- 9.6 Research, Development, Testing & Evaluation (RDT&E)
- 9.7 Joint Forces and Coalition Training
- 9.8 Operational Readiness & Mission Planning
- 9.9 Other Applications

10 GLOBAL AIR COMBAT MANEUVERING INSTRUMENTATION (ACMI) MARKET, BY GEOGRAPHY

- 10.1 Introduction
- 10.2 North America
 - 10.2.1 US
 - 10.2.2 Canada
 - 10.2.3 Mexico
- 10.3 Europe
 - 10.3.1 Germany
 - 10.3.2 UK
 - 10.3.3 Italy
 - 10.3.4 France
 - 10.3.5 Spain
 - 10.3.6 Rest of Europe
- 10.4 Asia Pacific
 - 10.4.1 Japan
 - 10.4.2 China
 - 10.4.3 India
 - 10.4.4 Australia
 - 10.4.5 New Zealand
 - 10.4.6 South Korea
 - 10.4.7 Rest of Asia Pacific
- 10.5 South America
 - 10.5.1 Argentina
 - 10.5.2 Brazil
 - 10.5.3 Chile
 - 10.5.4 Rest of South America
- 10.6 Middle East & Africa
 - 10.6.1 Saudi Arabia
 - 10.6.2 UAE
 - 10.6.3 Qatar

10.6.4 South Africa

10.6.5 Rest of Middle East & Africa

11 KEY DEVELOPMENTS

11.1 Agreements, Partnerships, Collaborations and Joint Ventures

11.2 Acquisitions & Mergers

11.3 New Product Launch

11.4 Expansions

11.5 Other Key Strategies

12 COMPANY PROFILING

12.1 Aerotree Defence & Services Sdn. Bhd.

12.2 BAE Systems

12.3 Boeing Company

12.4 ComAvia Systems Technologies Pvt. Ltd.

12.5 Cubic Corporation

12.6 DRS Technologies, Inc.

12.7 Elbit Systems

12.8 General Dynamics Corporation

12.9 Halbit Avionics Pvt. Ltd.

12.10 Hensoldt AG

12.11 Kongsberg Defence & Aerospace

12.12 L3Harris Technologies

12.13 Leonardo S.p.A.

12.14 Lockheed Martin Corporation

12.15 Northrop Grumman Corporation

12.16 Raytheon Technologies Corporation

12.17 Rheinmetall AG

12.18 Saab AB

12.19 Samtel Avionics

12.20 Thales Group

List Of Tables

LIST OF TABLES

Table 1 Global Air Combat Maneuvering Instrumentation (ACMI) Market Outlook, By Region (2024-2032) (\$MN)

Table 2 Global Air Combat Maneuvering Instrumentation (ACMI) Market Outlook, By Type (2024-2032) (\$MN)

Table 3 Global Air Combat Maneuvering Instrumentation (ACMI) Market Outlook, By Ground Exploitation (Debriefing) Station (GES) (2024-2032) (\$MN)

Table 4 Global Air Combat Maneuvering Instrumentation (ACMI) Market Outlook, By Airborne Instrumentation System (AIS) (2024-2032) (\$MN)

Table 5 Global Air Combat Maneuvering Instrumentation (ACMI) Market Outlook, By System (2024-2032) (\$MN)

Table 6 Global Air Combat Maneuvering Instrumentation (ACMI) Market Outlook, By Data Collection Systems (2024-2032) (\$MN)

Table 7 Global Air Combat Maneuvering Instrumentation (ACMI) Market Outlook, By Data Processing & Storage Systems (2024-2032) (\$MN)

Table 8 Global Air Combat Maneuvering Instrumentation (ACMI) Market Outlook, By Telemetry Systems (2024-2032) (\$MN)

Table 9 Global Air Combat Maneuvering Instrumentation (ACMI) Market Outlook, By Ground-Based Tracking & Control Systems (2024-2032) (\$MN)

Table 10 Global Air Combat Maneuvering Instrumentation (ACMI) Market Outlook, By Simulation & Debriefing Systems (2024-2032) (\$MN)

Table 11 Global Air Combat Maneuvering Instrumentation (ACMI) Market Outlook, By Integration & Networking Systems (2024-2032) (\$MN)

Table 12 Global Air Combat Maneuvering Instrumentation (ACMI) Market Outlook, By Maintenance & Support Systems (2024-2032) (\$MN)

Table 13 Global Air Combat Maneuvering Instrumentation (ACMI) Market Outlook, By Deployment (2024-2032) (\$MN)

Table 14 Global Air Combat Maneuvering Instrumentation (ACMI) Market Outlook, By Fixed Installation (2024-2032) (\$MN)

Table 15 Global Air Combat Maneuvering Instrumentation (ACMI) Market Outlook, By Mobile Deployment (2024-2032) (\$MN)

Table 16 Global Air Combat Maneuvering Instrumentation (ACMI) Market Outlook, By Deployable Pods (2024-2032) (\$MN)

Table 17 Global Air Combat Maneuvering Instrumentation (ACMI) Market Outlook, By Scale of Platform (2024-2032) (\$MN)

Table 18 Global Air Combat Maneuvering Instrumentation (ACMI) Market Outlook, By

Single Platform (2024-2032) (\$MN)

Table 19 Global Air Combat Maneuvering Instrumentation (ACMI) Market Outlook, By Multi-Platform (2024-2032) (\$MN)

Table 20 Global Air Combat Maneuvering Instrumentation (ACMI) Market Outlook, By Application (2024-2032) (\$MN)

Table 21 Global Air Combat Maneuvering Instrumentation (ACMI) Market Outlook, By Airmen Training & Simulation (2024-2032) (\$MN)

Table 22 Global Air Combat Maneuvering Instrumentation (ACMI) Market Outlook, By Tactical Evaluation & Performance Analysis (2024-2032) (\$MN)

Table 23 Global Air Combat Maneuvering Instrumentation (ACMI) Market Outlook, By Mission Rehearsal & Planning (2024-2032) (\$MN)

Table 24 Global Air Combat Maneuvering Instrumentation (ACMI) Market Outlook, By Doctrine Development & Training Concept Evaluation (2024-2032) (\$MN)

Table 25 Global Air Combat Maneuvering Instrumentation (ACMI) Market Outlook, By Research, Development, Testing & Evaluation (RDT&E) (2024-2032) (\$MN)

Table 26 Global Air Combat Maneuvering Instrumentation (ACMI) Market Outlook, By Joint Forces and Coalition Training (2024-2032) (\$MN)

Table 27 Global Air Combat Maneuvering Instrumentation (ACMI) Market Outlook, By Operational Readiness & Mission Planning (2024-2032) (\$MN)

Table 28 Global Air Combat Maneuvering Instrumentation (ACMI) Market Outlook, By Other Applications (2024-2032) (\$MN)

Note: Tables for North America, Europe, APAC, South America, and Middle East & Africa Regions are also represented in the same manner as above.

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