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Airborne Warning and Control System Market Forecasts to 2032 – Global Analysis By Platform (Fixed-Wing Aircraft, Rotary-Wing Aircraft and Unmanned Aerial Vehicles (UAVs)), System Component, Range, Technology, Application, End User and By Geography

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Abstracts

According to Stratistics MRC, the Global Airborne Warning and Control System Market is accounted for $5.30 billion in 2025 and is expected to reach $10.93 billion by 2032 growing at a CAGR of 10.9% during the forecast period. An Airborne Warning and Control System (AWACS) is a sophisticated airborne radar system designed to detect, track, and monitor aircraft, ships, and vehicles over long distances, providing real-time situational awareness and battle management capabilities. Mounted on specially modified aircraft, AWACS integrates advanced radar, sensors, and communication systems to monitor airspace, control fighter jets, and support surveillance, command, and control missions. It enables early warning of potential threats, ensuring superior defensive and offensive responses. Widely used in modern military operations, AWACS enhances force coordination, extends radar coverage beyond ground-based limitations, and plays a vital role in maintaining air superiority.

Market Dynamics:

Driver:

Network-centric warfare and ISR integration

The AWACS market is gaining momentum due to the shift toward integrated, networked

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combat operations. Enhanced ISR capabilities allow for real-time threat detection and mission coordination. Seamless data exchange across platforms boosts tactical decision-making. Defense agencies are focusing on multi-domain connectivity to counter asymmetric threats. AWACS systems act as airborne hubs for surveillance and command. This evolution in warfare strategy is accelerating market growth.

Restraint:

Very high acquisition and lifecycle costs

Deploying AWACS systems involves heavy capital expenditure and ongoing operational costs. Advanced radar, sensors, and avionics drive up initial investment. Maintenance, upgrades, and personnel training add to lifecycle expenses. These financial demands limit adoption, especially in cost-sensitive regions. Budgetary limitations slow procurement despite strategic importance. Overall, cost remains a key hurdle for market expansion.

Opportunity:

Increased defense modernization spending

Rising defense allocations worldwide are opening doors for AWACS investments. Governments are prioritizing airspace surveillance and command capabilities. Modernization initiatives are driving demand for multi-role airborne platforms. AWACS systems are central to next-gen defense architectures. Enhanced features like real-time data fusion and long-range detection are in focus. This funding surge supports long-term market growth.

Threat:

Long development and procurement timelines

AWACS platforms face extended development timelines due to technical sophistication. Procurement is often delayed by political shifts and budget reviews. Compatibility with existing systems adds complexity to integration. These delays hinder timely deployment in volatile regions. Strategic agility is compromised by slow execution. The market is exposed to risks from prolonged rollout schedules.

Covid-19 Impact:

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The Covid-19 pandemic had a mixed impact on the Airborne Warning and Control System (AWACS) market. Initially, global supply chain disruptions, delayed defense projects, and restricted budgets slowed market growth. Travel restrictions and reduced military exercises affected procurement and deployment schedules. However, rising geopolitical tensions and the need for enhanced situational awareness during emergencies reinforced the importance of AWACS. Governments prioritized defense modernization to strengthen surveillance and national security. Post-pandemic recovery brought renewed investments, driving long-term demand for advanced airborne warning and control systems.

The fixed-wing aircraft segment is expected to be the largest during the forecast period

The fixed-wing aircraft segment is expected to account for the largest market share during the forecast period due to their operational advantages. Their ability to carry large payloads supports sophisticated radar and communication arrays. These platforms offer extended range and mission endurance. Integration with ISR networks enhances strategic utility. Militaries favour fixed-wing AWACS for broad-area coverage. This segment will retain its dominant market position.

The homeland security segment is expected to have the highest CAGR during the forecast period

Over the forecast period, the homeland security segment is predicted to witness the highest growth rate rising threats from terrorism, border incursions, and internal security challenges. Governments are increasingly leveraging AWACS platforms for emergency response, disaster management, and national airspace monitoring. These systems provide rapid situational awareness and enable coordinated action across agencies. Mobile command and control capabilities are essential for real-time threat mitigation. The growing need for agile, multi-role surveillance solutions is accelerating adoption. As a result, homeland security is emerging as the fastest-growing application segment in the AWACS market.

Region with largest share:

During the forecast period, the North America region is expected to hold the largest market share due to strong research and development, and significant adoption of cutting-edge airborne warning and control technologies. Military forces focus on upgrading existing systems to enhance interoperability, cyber resilience, and real-time

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intelligence sharing. Strategic collaborations between defense contractors and government agencies foster innovation and modernization. Emphasis is placed on maintaining air dominance, supporting expeditionary missions, and integrating advanced sensors and AI-driven capabilities. The market benefits from steady defense spending and long-standing aerospace expertise in the region.

Region with highest CAGR:

Over the forecast period, the Asia Pacific region is anticipated to exhibit the highest CAGR is shaped by increasing defense modernization, regional security tensions, and growing investments in advanced surveillance. Countries are expanding air defense capabilities to enhance situational awareness and deter cross-border threats. Partnerships with global defense manufacturers are boosting technology transfer and local production. Rising demand for multi-role aircraft integration further strengthens market prospects. The region's evolving security environment and technological advancements are driving governments to prioritize airborne early warning capabilities.

Key players in the market

Some of the key players in Airborne Warning and Control System Market include Boeing, Northrop Grumman, Lockheed Martin, Raytheon Technologies, Saab AB, Thales Group, Leonardo S.p.A., BAE Systems, Airbus Defence and Space, Israel Aerospace Industries (IAI), Elbit Systems, L3Harris Technologies, General Dynamics, Indra Sistemas and Embraer Defense & Security.

Key Developments:

In February 2025, Boeing initiated acquisition of Spirit AeroSystems to streamline fuselage production, enhance quality control, and reduce supply chain disruptions. The move supports critical defense platforms like the E-7A Wedgetail, ensuring tighter integration and improved manufacturing efficiency.

In June 2025, Northrop Grumman signed a strategic MoU with South Korea's Hanwha Systems to co-develop integrated air defense solutions, combining Hanwha's radar with Northrop's IBCS command system to enhance interoperability and sensor fusion across Indo-Pacific and NATO theatres.

In June 2025, Lockheed Martin completed its $360 million acquisition of Amentum's Rapid Solutions business, adding radar, ISR payloads, and airborne mission systems to

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its portfolio. This strengthened Lockheed's AWACS capabilities through enhanced domain awareness and rapid integration technologies.

Platforms Covered:

- Fixed-Wing Aircraft
- Rotary-Wing Aircraft
- Unmanned Aerial Vehicles (UAVs)

System Components Covered:

- Radar System
- Identification Friend or Foe (IFF)
- Sensors
- Communication Systems
- Command & Control Systems
- Other System Components

Ranges Covered:

- Short Range
- Medium Range
- Long Range

Technologies Covered:

- Active Electronically Scanned Array (AESA)

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Passive Electronically Scanned Array (PESA)

Mechanical Scanning Radar

Applications Covered:

Surveillance & Reconnaissance

Command & Control

Electronic Warfare

Battle Management

Search & Rescue

Other Applications

End Users Covered:

Defense Forces

Homeland Security

Other End Users

Regions Covered:

North America

US

Canada

Mexico

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- 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

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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

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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

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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 Technology Analysis
3.7 Application Analysis
3.8 End User Analysis
3.9 Emerging Markets
3.10 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

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5 GLOBAL AIRBORNE WARNING AND CONTROL SYSTEM MARKET, BY PLATFORM

5.1 Introduction
5.2 Fixed-Wing Aircraft
5.3 Rotary-Wing Aircraft
5.4 Unmanned Aerial Vehicles (UAVs)

6 GLOBAL AIRBORNE WARNING AND CONTROL SYSTEM MARKET, BY SYSTEM COMPONENT

6.1 Introduction
6.2 Radar System
6.3 Identification Friend or Foe (IFF)
6.4 Sensors
6.5 Communication Systems
6.6 Command & Control Systems
6.7 Other System Components

7 GLOBAL AIRBORNE WARNING AND CONTROL SYSTEM MARKET, BY RANGE

7.1 Introduction
7.2 Short Range
7.3 Medium Range
7.4 Long Range

8 GLOBAL AIRBORNE WARNING AND CONTROL SYSTEM MARKET, BY TECHNOLOGY

8.1 Introduction
8.2 Active Electronically Scanned Array (AESA)
8.3 Passive Electronically Scanned Array (PESA)
8.4 Mechanical Scanning Radar

9 GLOBAL AIRBORNE WARNING AND CONTROL SYSTEM MARKET, BY APPLICATION

9.1 Introduction

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9.2 Surveillance & Reconnaissance
9.3 Command & Control
9.4 Electronic Warfare
9.5 Battle Management
9.6 Search & Rescue
9.7 Other Applications

10 GLOBAL AIRBORNE WARNING AND CONTROL SYSTEM MARKET, BY END USER

10.1 Introduction
10.2 Defense Forces
10.3 Homeland Security
10.4 Other End Users

11 GLOBAL AIRBORNE WARNING AND CONTROL SYSTEM MARKET, BY GEOGRAPHY

11.1 Introduction
11.2 North America
  11.2.1 US
  11.2.2 Canada
  11.2.3 Mexico
11.3 Europe
  11.3.1 Germany
  11.3.2 UK
  11.3.3 Italy
  11.3.4 France
  11.3.5 Spain
  11.3.6 Rest of Europe
11.4 Asia Pacific
  11.4.1 Japan
  11.4.2 China
  11.4.3 India
  11.4.4 Australia
  11.4.5 New Zealand
  11.4.6 South Korea
  11.4.7 Rest of Asia Pacific
11.5 South America

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11.5.1 Argentina
11.5.2 Brazil
11.5.3 Chile
11.5.4 Rest of South America
11.6 Middle East & Africa
11.6.1 Saudi Arabia
11.6.2 UAE
11.6.3 Qatar
11.6.4 South Africa
11.6.5 Rest of Middle East & Africa

12 KEY DEVELOPMENTS

12.1 Agreements, Partnerships, Collaborations and Joint Ventures
12.2 Acquisitions & Mergers
12.3 New Product Launch
12.4 Expansions
12.5 Other Key Strategies

13 COMPANY PROFILING

13.1 Boeing
13.2 Northrop Grumman
13.3 Lockheed Martin
13.4 Raytheon Technologies
13.5 Saab AB
13.6 Thales Group
13.7 Leonardo S.p.A.
13.8 BAE Systems
13.9 Airbus Defence and Space
13.10 Israel Aerospace Industries (IAI)
13.11 Elbit Systems
13.12 L3Harris Technologies
13.13 General Dynamics
13.14 Indra Sistemas
13.15 Embraer Defense & Security

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List Of Tables

LIST OF TABLES

Table 1 Global Airborne Warning and Control System Market Outlook, By Region (2024-2032) ($MN)
Table 2 Global Airborne Warning and Control System Market Outlook, By Platform (2024-2032) ($MN)
Table 3 Global Airborne Warning and Control System Market Outlook, By Fixed-Wing Aircraft (2024-2032) ($MN)
Table 4 Global Airborne Warning and Control System Market Outlook, By Rotary-Wing Aircraft (2024-2032) ($MN)
Table 5 Global Airborne Warning and Control System Market Outlook, By Unmanned Aerial Vehicles (UAVs) (2024-2032) ($MN)
Table 6 Global Airborne Warning and Control System Market Outlook, By System Component (2024-2032) ($MN)
Table 7 Global Airborne Warning and Control System Market Outlook, By Radar System (2024-2032) ($MN)
Table 8 Global Airborne Warning and Control System Market Outlook, By Identification Friend or Foe (IFF) (2024-2032) ($MN)
Table 9 Global Airborne Warning and Control System Market Outlook, By Sensors (2024-2032) ($MN)
Table 10 Global Airborne Warning and Control System Market Outlook, By Communication Systems (2024-2032) ($MN)
Table 11 Global Airborne Warning and Control System Market Outlook, By Command & Control Systems (2024-2032) ($MN)
Table 12 Global Airborne Warning and Control System Market Outlook, By Other System Components (2024-2032) ($MN)
Table 13 Global Airborne Warning and Control System Market Outlook, By Range (2024-2032) ($MN)
Table 14 Global Airborne Warning and Control System Market Outlook, By Short Range (2024-2032) ($MN)
Table 15 Global Airborne Warning and Control System Market Outlook, By Medium Range (2024-2032) ($MN)
Table 16 Global Airborne Warning and Control System Market Outlook, By Long Range (2024-2032) ($MN)
Table 17 Global Airborne Warning and Control System Market Outlook, By Technology (2024-2032) ($MN)
Table 18 Global Airborne Warning and Control System Market Outlook, By Active

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Electronically Scanned Array (AESA) (2024-2032) ($MN)
Table 19 Global Airborne Warning and Control System Market Outlook, By Passive Electronically Scanned Array (PESA) (2024-2032) ($MN)
Table 20 Global Airborne Warning and Control System Market Outlook, By Mechanical Scanning Radar (2024-2032) ($MN)
Table 21 Global Airborne Warning and Control System Market Outlook, By Application (2024-2032) ($MN)
Table 22 Global Airborne Warning and Control System Market Outlook, By Surveillance & Reconnaissance (2024-2032) ($MN)
Table 23 Global Airborne Warning and Control System Market Outlook, By Command & Control (2024-2032) ($MN)
Table 24 Global Airborne Warning and Control System Market Outlook, By Electronic Warfare (2024-2032) ($MN)
Table 25 Global Airborne Warning and Control System Market Outlook, By Battle Management (2024-2032) ($MN)
Table 26 Global Airborne Warning and Control System Market Outlook, By Search & Rescue (2024-2032) ($MN)
Table 27 Global Airborne Warning and Control System Market Outlook, By Other Applications (2024-2032) ($MN)
Table 28 Global Airborne Warning and Control System Market Outlook, By End User (2024-2032) ($MN)
Table 29 Global Airborne Warning and Control System Market Outlook, By Defense Forces (2024-2032) ($MN)
Table 30 Global Airborne Warning and Control System Market Outlook, By Homeland Security (2024-2032) ($MN)
Table 31 Global Airborne Warning and Control System Market Outlook, By Other End Users (2024-2032) ($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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