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Airborne Countermeasures Market Forecasts to 2032 – Global Analysis By Product (Directional Infrared Countermeasures (DIRCM), Common Infrared Countermeasures (CIRCM), Jammers, Self-Protection EW Suites, Identification Friend or Foe (IFF) Systems, Missile Approach Warning Systems (MAWS), Laser Warning Systems, Radar Warning Receivers (RWR), Electronic-Counter Countermeasure Systems (ECCM) and Electromechanical Dispensers), Platform, Application, End User and By Geography

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Abstracts

According to Stratistics MRC, the Global Airborne Countermeasures Market is accounted for $22.94 billion in 2025 and is expected to reach $34.95 billion by 2032 growing at a CAGR of 6.2% during the forecast period. Defensive systems installed on airplanes to identify, disorient, or destroy incoming threats like radar-guided or infrared-guided missiles are known as airborne countermeasures. These systems include technologies such as electronic countermeasures (ECM) that jam enemy radar and communication signals, decoys that mimic the aircraft's signature, flares, and chaff. Moreover, airborne countermeasures are essential for improving aircraft survivability in hostile environments when combined with onboard sensors and threat detection systems.

According to the Association of Old Crows (AOC), more than 13,000 members across 47 countries collaborate on advancing electronic warfare capabilities, including airborne countermeasures.

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Market Dynamics:

Driver:

Growing military spending worldwide

Geopolitical tensions, the changing nature of warfare, and the need for strategic deterrence have all contributed to a steady increase in global defense budgets. Advanced airborne countermeasure systems are one of the many air force capabilities that nations are investing heavily in. In order to improve survivability against radar-guided and infrared threats, these systems are now regarded as crucial for both vintage and modern aircraft. Additionally, the modernization of electronic warfare suites on combat and support aircraft has been allocated a sizeable amount of defense budgets by nations like the United States, China, India, and NATO members.

Restraint:

Expensive development and integration expenses

Significant R&D expenditures are required to develop airborne countermeasure systems, particularly next-generation ones like Directed Infrared Countermeasures (DIRCM) or DRFM-based jammers. The cost of these systems is increased by the need for extensive testing to guarantee performance in harsh environments and compatibility with aircraft avionics. Furthermore, incorporating these systems into already existing aircraft platforms frequently necessitates considerable adjustments to the structural design, power systems, and onboard architecture. This makes it less practical for nations with limited defense budgets or older fleets because it not only raises upfront costs but also necessitates prolonged downtime for retrofitting.

Opportunity:

Countermeasures using machine learning and artificial intelligence

Airborne countermeasure systems' ability to recognize, evaluate, and react to threats is being drastically changed by AI and ML. While traditional systems relied on static response protocols and pre-programmed libraries, AI-powered systems are now able to classify threats more precisely, deploy the best jamming or decoy strategy instantly, and adaptively analyze the electromagnetic environment in real time. Moreover, this

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development creates new opportunities for AI-integrated EW suites that improve automation, lessen operator workload, and boost combat survivability in challenging, multi-threat situations.

Threat:

Export restrictions and geopolitical instability

The political dynamics of embargoes, sanctions, and export restrictions have a significant impact on the global defense ecosystem. International controls, such as ITAR, may make it difficult for embargoed countries to acquire advanced airborne countermeasures from Western supply chains. These limitations slow down the market and make supply chains more difficult. Additionally, geopolitical tensions can also cause uncertainty in long-term procurement programs, delayed delivery schedules, and disruptions in allied nations' cooperation.

Covid-19 Impact:

The COVID-19 pandemic caused supply chain disruptions, manufacturing delays, and postponements of defence procurement programs because of budget reallocations to healthcare and economic recovery, which momentarily disrupted the airborne countermeasures market. Production schedules were affected by lockdowns and workforce restrictions, which also slowed research and development of sophisticated countermeasure technologies. Furthermore, there were fewer international defence exhibitions and training exercises, which reduced market participants' chances to demonstrate their innovations and land contracts. As part of larger military readiness initiatives after the pandemic, several governments have accelerated or resumed investments in airborne protection systems, highlighting the significance of modernizing defence and national security.

The directional infrared countermeasures (DIRCM) segment is expected to be the largest during the forecast period

The directional infrared countermeasures (DIRCM) segment is expected to account for the largest market share during the forecast period. Advanced defensive technologies known as DIRCM systems are made to defend aircraft against heat-seeking missiles. They do this by identifying potential threats and directing extremely precise infrared laser beams to confuse or disable the missile's tracking system. Because of their accuracy, ability to effectively counter a variety of missile threats, and compatibility with

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contemporary aircraft, DIRCM is an essential part of airborne defense. Moreover, these systems' substantial improvement in aircraft survival in harsh conditions fuels their hegemonic market share and continuous demand in the defense and military aviation industries.

The infrared countermeasures (IRCM) segment is expected to have the highest CAGR during the forecast period

Over the forecast period, the infrared countermeasures (IRCM) segment is predicted to witness the highest growth rate. The growing complexity of infrared-guided missile threats and the growing need for sophisticated protection systems on military aircraft are the main drivers of this growth. By interfering with their infrared seekers, IRCM technologies—such as laser-based systems and directional infrared countermeasures—effectively identify, track, and eliminate incoming missile threats. Additionally, IRCM adoption is a rapidly growing segment of the airborne countermeasures landscape, driven by the imperative need to protect airborne assets against heat-seeking missiles as modern warfare develops.

Region with largest share:

During the forecast period, the North America region is expected to hold the largest market share, mainly because of its substantial military spending and robust defense infrastructure. The region's market is growing because of the presence of top aerospace and defense companies as well as ongoing developments in airborne countermeasure technologies. Furthermore, the need for sophisticated electronic warfare systems, such as missile warning and jamming technologies, is driven by continuous modernization initiatives within the armed forces of the United States and Canada. North America is now the most important regional player in the airborne countermeasures market worldwide owing to strategic government initiatives and growing defense budgets.

Region with highest CAGR:

Over the forecast period, the Asia Pacific region is anticipated to exhibit the highest CAGR. Significant increases in defense budgets in nations like China, India, Japan, and South Korea, which are seeking to improve their air defense capabilities, are the main drivers of this growth. The region's strategic emphasis on updating its armed forces' fleets, which includes purchasing cutting-edge aircraft with cutting-edge countermeasures, drives market growth even more. Moreover, APAC is a rapidly expanding market in this sector due to the need for strong airborne countermeasure

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solutions, which is further highlighted by increased geopolitical tensions and regional security concerns.

Key players in the market

Some of the key players in Airborne Countermeasures Market include BAE Systems Plc., Israel Aerospace Industries (IAI) Ltd., Elbit Systems Ltd., L3Harris Technologies Inc., Aselsan A.S., Thales Group, Lockheed Martin Corporation, General Dynamics Corporation, Textron Systems Inc, Bird Aerosystems Ltd., Leonardo S.p.A., Raytheon Technologies Corporation, Northrop Grumman Corporation, Bharat Electronics Limited and Saab AB.

Key Developments:

In March 2025, L3Harris Technologies has signed a long-term agreement with the Dutch Ministry of Defence for delivery of advanced Falcon® IV radios for the FOXTROT program. The agreement is valued up to 1 billion euros. The Falcon IV radios will allow immediate interoperability with more than 1 million tactical devices already fielded globally.

In July 2024, Israel Aerospace Industries (IAI), one of Israel’s largest defense companies, has reportedly secured a supply agreement worth $1 billion with an unnamed third party. The substantial agreement is set to be delivered over five years and completed by 2029. Although IAI has not revealed specific details about the deal or the client, foreign media speculates that it involves the delivery of satellites to Morocco.

In July 2024, BAE Systems and Siemens have announced an agreement that will see the two businesses collaborate on innovation in engineering and manufacturing technologies embracing digital transformation, whilst leveraging digital capabilities throughout program lifecycles. The five-year agreement is designed to explore and develop a strategic blueprint for engineering of the future and factory of the future capabilities across design and manufacturing disciplines within BAE Systems.

Products Covered:

Directional Infrared Countermeasures (DIRCM)

Common Infrared Countermeasures (CIRCM)

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- Jammers
- Self-Protection EW Suites
- Identification Friend or Foe (IFF) Systems
- Missile Approach Warning Systems (MAWS)
- Laser Warning Systems
- Radar Warning Receivers (RWR)
- Electronic-Counter Countermeasure Systems (ECCM)
- Electromechanical Dispensers

Platforms Covered:

- Military Aircraft
- Military Helicopters
- UAVs (Unmanned Aerial Vehicles)

Applications Covered:

- Jamming
- Missile Defense
- Counter Countermeasure
- Radar Deception
- Infrared Countermeasures

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End Users Covered:

- Defense/ Military Forces
- Homeland Security

Regions Covered:

- North America
  - US
  - Canada
  - Mexico
- Europe
  - Germany
  - UK
  - Italy
  - France
  - Spain
  - Rest of Europe
- Asia Pacific
  - Japan
  - China
  - India

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- 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

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- 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

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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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