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Surveillance Radars Market Forecasts to 2034 – Global Analysis By Radar Platform (Ground-Based Surveillance Radars, Naval Surveillance Radars, Airborne Surveillance Radars, Space-Based Surveillance Radars, Mobile & Transportable Radars, Fixed Installation Radars, Other Radar Platforms), Frequency Band, Detection Capability, Application, End User and By Geography

https://marketpublishers.com/r/S7BD11852CF3EN.html
Date: February 2026
Pages: 200
Price: US$ 4,150.00 (Single User License)
ID: S7BD11852CF3EN

Abstracts

According to Stratistics MRC, the Global Surveillance Radars Market is accounted for $10.53 billion in 2026 and is expected to reach $19.12 billion by 2034 growing at a CAGR of 7.7% during the forecast period. Surveillance radars are advanced sensing systems designed to detect, track, and monitor objects over wide areas, providing real-time situational awareness. They operate by transmitting electromagnetic waves and analyzing the signals reflected from targets, such as aircraft, ships, vehicles, or even weather formations. These radars are essential for air traffic control, border security, maritime navigation, and military defense, enabling early warning and threat assessment. Equipped with features like long-range detection, high-resolution imaging, and multi-target tracking, surveillance radars enhance operational safety and strategic decision-making. Modern systems often integrate with digital networks for automated monitoring and data analysis.

Market Dynamics:

Driver:

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Rising global defense modernization programs

Governments are investing heavily in advanced radar systems to strengthen national security. Modernization initiatives focus on upgrading legacy systems with AI-enabled and multi-domain surveillance capabilities. Rising geopolitical tensions and cross-border threats amplify demand for radar deployments. Defense agencies prioritize radars for real-time monitoring, air defense, and battlefield awareness. Consequently, defense modernization acts as a primary driver for market growth.

Restraint:

Complex integration with existing infrastructure

Legacy systems often lack compatibility with advanced radar technologies. Integration requires high capital expenditure and specialized expertise. Operators face risks of downtime and operational inefficiencies during upgrades. Smaller defense agencies struggle with resource constraints in managing hybrid setups. As a result, integration complexity acts as a key restraint on market expansion.

Opportunity:

Expansion in maritime and coastal monitoring

Rising concerns over illegal fishing, smuggling, and territorial disputes drive demand for coastal surveillance systems. Radars provide real-time monitoring of maritime traffic and enhance situational awareness. Governments are investing in coastal security initiatives to protect trade routes and naval assets. Integration with AI-driven analytics amplifies efficiency in maritime monitoring. Therefore, coastal and maritime expansion acts as a catalyst for innovation and growth.

Threat:

Stringent export and regulatory restrictions

Surveillance radars are subject to strict international arms trade regulations. Export controls limit access to advanced radar technologies in certain regions. Vendors face challenges in navigating complex compliance frameworks. Regulatory delays hinder cross-border collaborations and procurement processes. Collectively, export restrictions remain a major threat to sustained adoption.

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Covid-19 Impact:

The Covid-19 pandemic disrupted supply chains and delayed defense procurement programs. Lockdowns restricted manufacturing and slowed down radar deployment projects. Budget reallocations toward healthcare temporarily reduced defense spending in some regions. However, rising emphasis on border security and remote monitoring boosted long-term demand. Defense agencies accelerated adoption of unmanned and automated radar systems during restrictions. Overall, Covid-19 acted as both a disruptor and a catalyst for innovation in surveillance radar practices.

The ground-based surveillance radars segment is expected to be the largest during the forecast period

The ground-based surveillance radars segment is expected to account for the largest market share during the forecast period as they form the backbone of national defense infrastructure. Ground-based radars provide wide-area coverage for air defense, border monitoring, and battlefield awareness. Governments prioritize these systems for their reliability and scalability. Rising demand for counter-drone and low-altitude detection further amplifies adoption. Technological advancements in phased-array and multi-mode radars strengthen this segment.

The critical infrastructure protection segment is expected to have the highest CAGR during the forecast period

Over the forecast period, the critical infrastructure protection segment is predicted to witness the highest growth rate due to rising threats to energy, transport, and communication assets. Surveillance radars provide real-time monitoring of sensitive facilities against intrusions and aerial threats. Governments and enterprises prioritize radar systems to safeguard airports, power plants, and data centers. Rising adoption of AI-driven analytics enhances predictive monitoring capabilities. Increasing cyber-physical threats amplify reliance on radar-based protection.

Region with largest share:

During the forecast period, the North America region is expected to hold the largest market share as it hosts major defense contractors and advanced military infrastructure. The presence of companies such as Lockheed Martin, Raytheon Technologies, and Northrop Grumman drives concentrated investment in radar systems. Governments

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prioritize adoption to meet stringent defense modernization and homeland security requirements. Strong adoption across air defense, border security, and critical infrastructure reinforces demand. The region benefits from high defense budgets and advanced R&D initiatives. Investments in AI-enabled radar systems and partnerships with NATO allies further strengthen market leadership.

Region with highest CAGR:

Over the forecast period, the Asia Pacific region is anticipated to exhibit the highest CAGR owing to rising defense spending and regional security challenges. Countries such as China, India, South Korea, and Japan are investing heavily in radar modernization programs. Territorial disputes and maritime tensions amplify demand for coastal and airborne surveillance systems. Rapid adoption of UAVs and autonomous defense platforms intensifies reliance on radar technologies. Government initiatives promoting indigenous defense manufacturing accelerate adoption across the region. Emerging economies also contribute significantly to rising demand for cost-effective radar solutions.

Key players in the market

Some of the key players in Surveillance Radars Market include Lockheed Martin Corporation, Raytheon Technologies Corporation, Northrop Grumman Corporation, Thales Group, Leonardo S.p.A., BAE Systems plc, Israel Aerospace Industries Ltd., Saab AB, Indra Sistemas, S.A., Elbit Systems Ltd., L3Harris Technologies, Inc., Hensoldt AG, Mitsubishi Electric Corporation, ASELSAN A.?. and RTX Corporation.

Key Developments:

In June 2024, Lockheed Martin entered into a Cooperative Research and Development Agreement (CRADA) with U.S. Indo-Pacific Command to demonstrate the TACAN concept, integrating the Tactical Long-Range Radar (TLRR) with multi-domain sensors. This partnership aims to create a resilient, AI-enabled mesh network for enhanced air and missile surveillance across vast distances in the Pacific theater.

In August 2023, Raytheon delivered the first AN/SPY-6(V)2 radar to the U.S. Navy, designed for the Flight III Arleigh Burke-class destroyer USS Jack H. Lucas. This radar provides significantly enhanced sensitivity and discrimination capabilities over previous generations, representing a major leap in naval surveillance and air defense.

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Radar Platforms Covered:

- Ground-Based Surveillance Radars
- Naval Surveillance Radars
- Airborne Surveillance Radars
- Space-Based Surveillance Radars
- Mobile & Transportable Radars
- Fixed Installation Radars
- Other Radar Platforms

Multi-Band Radars Covered:

- L-Band Radars
- S-Band Radars
- C-Band Radars
- X-Band Radars
- Ku / Ka-Band Radars
- Multi-Band Radars

Detection Capability Covered:

- Long-Range Detection Radars
- Medium-Range Detection Radars
- Short-Range Detection Radars

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- Low-Altitude Detection Radars
- High-Resolution Tracking Radars

Applications Covered:

- Border Surveillance
- Airspace Monitoring
- Maritime Domain Awareness
- Battlefield Surveillance
- Critical Infrastructure Protection
- Other Applications

End Users Covered:

- Defense Forces
- Homeland Security Agencies
- Air Traffic Control Authorities
- Naval & Coast Guard Forces
- Commercial Aviation Authorities
- Other End Users

Regions Covered:

- North America

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- United States
- Canada
- Mexico

Europe

- United Kingdom
- Germany
- France
- Italy
- Spain
- Netherlands
- Belgium
- Sweden
- Switzerland
- Poland
- Rest of Europe

Asia Pacific

- China
- Japan
- India

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- South Korea
- Australia
- Indonesia
- Thailand
- Malaysia
- Singapore
- Vietnam
- Rest of Asia Pacific

South America

- Brazil
- Argentina
- Colombia
- Chile
- Peru
- Rest of South America

Rest of the World (RoW)

- Middle East
- Saudi Arabia
- United Arab Emirates
- Qatar

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Israel

Rest of Middle East

Africa

South Africa

Egypt

Morocco

Rest of 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 2023, 2024, 2025, 2026, 2027, 2028, 2030, 3032 and 2034
- 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)

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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 Rest of the World (RoW) are also represented in the same manner as above.

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