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Targeting Pods Market Forecasts to 2030 – Global Analysis By Product Type (Fixed Pods, Mobile Pods, and Multi-Function Pods), Component, Technology, Platform, Fit, Application and By Geography

https://marketpublishers.com/r/T7FE00C2B306EN.html
Date: February 2025
Pages: 150
Price: US$ 4,150.00 (Single User License)
ID: T7FE00C2B306EN

Abstracts

According to Stratistics MRC, the Global Targeting Pods Market is accounted for $5.29 billion in 2024 and is expected to reach $8.68 billion by 2030 growing at a CAGR of 8.6% during the forecast period. Military planes employ specialized technology called targeting pods to locate and engage ground targets. Usually, they have sensors like laser designators and infrared cameras that let pilots identify, track, and pinpoint targets for precision-guided ammunition. Military forces may engage targets more precisely and with less collateral damage thanks to targeting pods, which improve the accuracy and efficacy of air-to-ground attacks.

According to the FY2021 defense appropriations bill, the budget bill funded F-15EX procurement at USD 1.23 billion for 12 aircraft. US DoD projects a production schedule that would reach 19 per year in FY2024. The contract for all 144 jets is estimated at USD 22.9 billion.

Market Dynamics:

Driver:

Increase in unmanned aerial vehicles (UAVs)

Targeting pod sales have significantly benefited from the growing usage of Unmanned Aerial Vehicles (UAVs). Advanced targeting pods that are lightweight, small, and incredibly effective are in high demand as UAVs become more and more integrated into

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contemporary military plans. These pods improve UAV capabilities by offering accurate targeting, real-time imagery, and efficient threat detection. The increased use of UAVs has created more market prospects for targeting pod makers, promoting technological research and the creation of specialized products for UAV platforms, especially for counterterrorism, defense, and border security operations.

Restraint:

High cost of development and procurement

Advanced targeting pods involve sophisticated technologies, including infrared sensors, electro-optical systems, and precision guidance mechanisms, all of which require significant investment in research, development, and manufacturing. This results in high procurement costs, limiting the accessibility of these systems, especially for smaller defense budgets in emerging economies. Additionally, the need for specialized training, maintenance, and upgrades further adds to the overall cost. As a result, the high financial barrier can slow down the widespread adoption and deployment of advanced targeting pods, particularly in resource-constrained regions.

Opportunity:

Growth in counterterrorism operations

Advanced targeting systems have grown crucial as counterterrorism operations depend more and more on accurate, real-time intelligence for successful mission execution. With the use of targeting pods, military and security teams may more accurately detect and eliminate threats because to high-resolution imaging, infrared capabilities, and real-time data. The demand for advanced targeting pods, especially in unmanned aerial vehicles (UAVs) and manned platforms is driven by the increasing frequency of such operations as well as the necessity for improved monitoring and precision in war zones. More compact, economical, and effective systems for counterterrorism applications are being developed as a result of the increased demand for sophisticated targeting solutions.

Threat:

Limited upgrades in legacy systems

Older military platforms frequently have trouble integrating with more recent,

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sophisticated targeting technologies, hence the market for targeting pods is challenged by limited improvements in legacy systems. The advanced sensors and electronics used in contemporary targeting pods were not built into many legacy systems, which can lead to incompatibilities and decreased performance. Consequently, it is challenging for defense agencies to improve or upgrade current platforms without having to spend a lot of money retrofitting or replacing entire systems. This restriction inhibits the uptake of newer technology and could impede market expansion overall, especially in areas with little funding or outdated military infrastructure.

Covid-19 Impact

The COVID-19 pandemic had a mixed impact on the barium sulphate market. While lockdowns and economic slowdowns initially disrupted supply chains and reduced demand in sectors like construction and automotive, the healthcare sector experienced increased demand for barium sulphate as a contrast agent in medical imaging procedures. The overall impact varied depending on the specific application and regional market conditions.

The fixed pods segment is expected to be the largest during the forecast period

The fixed pods segment is expected to account for the largest market share during the forecast period, due to increasing demand for high-quality barium sulfate in various end-use industries, such as oil and gas, paints and coatings, and pharmaceuticals. Additionally, the rising adoption of advanced technologies in the mining and processing of barium sulfate, coupled with stringent environmental regulations, is further propelling the growth of the fixed pods market.

The search & rescue segment is expected to have the highest CAGR during the forecast period

Over the forecast period, the search & rescue segment is predicted to witness the highest growth rate, due to its reliance on high-performance materials in equipment used during operations. Barium sulfate is commonly used in radiopaque contrast agents for medical imaging, which plays a critical role in the quick diagnosis and treatment of injured individuals during rescue missions. Furthermore, barium sulfate is used in advanced materials for constructing search and rescue vehicles and protective equipment, offering durability and weight advantages. The increasing demand for faster, more effective rescue operations boosts the need for innovative materials like barium sulfate, driving its adoption in related applications.

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Region with largest share:

During the forecast period, Asia Pacific region is expected to hold the largest market share, due to growing demand for construction, automotive, and manufacturing sectors. The increased use of barium sulfate in paints, coatings, and plastics, as well as its role in the oil and gas industry, contributes to market growth. Additionally, rising investments in infrastructure and expanding defense and medical sectors in countries like China and India further drive the demand for barium sulfate, particularly in high-performance applications.

Region with highest CAGR:

Over the forecast period, the North America region is anticipated to exhibit the highest CAGR. The region's strong automotive, construction, and oil and gas industries drive demand for barium sulfate, particularly in drilling fluids and coatings. Additionally, the focus on technological advancements and sustainable products in North America fuels the adoption of barium sulfate in eco-friendly formulations, supporting market growth. Regulatory standards also encourage the use of non-toxic, high-performance materials.

Key players in the market

Some of the key players profiled in the Targeting Pods Market include Lockheed Martin Corporation, Northrop Grumman Corporation, Raytheon Technologies Corporation, Leonardo S.p.A., Thales Group, L3Harris Technologies, BAE Systems, Elbit Systems Ltd., Saab AB, General Atomics, Rafael Advanced Defense Systems, Israel Aerospace Industries Ltd., Harris Corporation, Textron Inc., and Sensis Corporation.

Key Developments:

In January 2025, BAE Systems has signed an agreement with Airbus to provide the energy storage system for Airbus’ micro hybridization demonstration project for commercial aircraft. The two companies will advance sustainable aviation by maturing and integrating electrification technologies that can reduce aviation’s carbon footprint.

In December 2024, Northrop Grumman Corporation announced that its fourth quarter and full-year 2024 financial results will be posted on its investor relations website. Prior to the market opening, the company will issue an advisory release notifying the public of the availability of the complete and full text earnings release on the company’s website.

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In December 2024, RTX's Collins Aerospace announces avionics modernization program for King Air and Hawker aircraft. Collins Aerospace, an RTX business, has announced a comprehensive avionics upgrade and modernization program for Beechcraft King Air and Hawker aircraft, spanning Collins' Pro Line Fusion® and Pro Line 21™ advanced avionics systems.

Product Types Covered:

- Fixed Pods
- Mobile Pods
- Multi-Function Pods

Components Covered:

- FLIR Sensor
- Charge-Coupled Device (CCD) Camera
- Environmental Control Unit (ECU)
- Video Data link
- Digital Data Record
- Processor
- Moving Map System (MMS
- Other Components

Technologies Covered:

- Laser Targeting Pods

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Infrared Targeting Pods

Electro-Optical Targeting Pods

Radar Targeting Pods

Laser Designators

Laser Spot Treackers

Platforms Covered:

Bombers

Unmanned Aerial Vehicles (UAVs)

Combat Aircraft

Attack Helicopters

Fits Covered:

Original Equipment Manufacturer (OEM) Fit

Upgradation

Applications Covered:

Reconnaissance & Surveillance

Air-to-Ground Strikes

Search & Rescue

Defense and Military

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- 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

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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 2022, 2023, 2024, 2026, and 2030
- 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

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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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