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Airborne Surveillance Market ? Global Industry Size, Share, Trends, Opportunity, and Forecast, Segmented By Type (LiDAR, Radar, and Imaging System), By Product Type (Manned System, Unmanned System), By Service (Surveillance Training, Data Analysis, Mission Equipped Aircraft, and Aircraft Leasing), By Application (Military, Defense & Security, and Commercial), By Region & Competition, 2021-2031F

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Abstracts

The Global Airborne Surveillance Market is projected to expand from USD 8.23 Billion in 2025 to USD 11.65 Billion by 2031, reflecting a compound annual growth rate of 5.96%. This sector encompasses both manned and unmanned aircraft outfitted with sophisticated sensors, radar, and imaging technologies designed to monitor maritime and ground activities for intelligence gathering. The market's upward trajectory is largely fueled by escalating geopolitical instability and the critical need for real-time situational awareness to protect borders and essential infrastructure, prompting nations to heavily invest in defense capabilities. According to the Stockholm International Peace Research Institute, global military expenditure climbed to 2,718 billion United States dollars in 2024, indicating a substantial rise in defense funding that directly enables the acquisition of surveillance technologies.

However, market expansion encounters a significant hurdle due to the high acquisition and operational costs linked to advanced sensor suites and aircraft platforms. These financial requirements can burden government budgets and impede fleet modernization initiatives, particularly in nations with constrained fiscal resources. Consequently, high lifecycle costs continue to act as a substantial barrier to widespread adoption, even as

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the operational requirement for persistent aerial monitoring continues to grow globally.

Market Driver

The rapid adoption of Unmanned Aerial Vehicles (UAVs) serves as a transformative market driver, offering cost-efficient and high-endurance alternatives to traditional manned aircraft. Defense agencies are increasingly prioritizing the acquisition of remotely piloted systems to execute persistent intelligence, surveillance, and reconnaissance (ISR) missions in volatile areas without endangering aircrews. This shift fuels the demand for advanced drones equipped with multi-spectral sensors and synthetic aperture radars for long-range data gathering. For example, the Defense Security Cooperation Agency reported in February 2024 that the U.S. State Department approved a 3.99 billion USD foreign military sale to India for thirty-one MQ-9B SkyGuardian drones and related equipment, illustrating how unmanned platforms are becoming central to national security strategies and expanding the market for airborne surveillance.

Additionally, rising global defense and military spending provides the primary financial support for modernizing and expanding airborne intelligence capabilities. Heightened geopolitical tensions and regional instability are driving nations to increase fiscal allocations for replacing aging legacy fleets with networked, multi-mission systems, supporting high-value contracts for new airframes and next-generation avionics. According to a June 2024 North Atlantic Treaty Organization report, defense spending across European Allies and Canada rose by 17.9% in real terms for 2024; such expanded budgets directly fund major procurement programs, as seen in the U.S. Air Force's 2024 award of a 2.56 billion USD contract modification to Boeing for two E-7A Wedgetail prototypes, underscoring the massive capital flow toward strengthening aerial monitoring infrastructure.

Market Challenge

The prohibitive acquisition and operational costs associated with advanced sensor suites and aircraft platforms represent a significant impediment to the Global Airborne Surveillance Market. Governments with finite defense budgets frequently face difficulties in allocating sufficient funds for these expensive systems, necessitating trade-offs between modernizing fleets and maintaining existing assets. This financial strain is especially acute for developing nations, where the capital expenditure required for integration and lifecycle maintenance can make essential intelligence capabilities

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unaffordable, often leading to delays or reductions in procurement programs despite the clear operational need for aerial monitoring.

Furthermore, the rising cost of aviation platforms exacerbates this challenge, as inflation and supply chain complexities drive up the prices of the base aircraft used in these operations. According to the General Aviation Manufacturers Association, the total value of worldwide airplane deliveries reached 26.7 billion United States dollars in 2024, marking a 14.3% increase from the previous year. This significant rise in delivery value, which disproportionately outpaced the growth in unit shipments, indicates a sharp escalation in per-unit aircraft costs. Such inflationary trends in platform pricing directly compound the budgetary difficulties faced by operators, restricting the widespread adoption of airborne surveillance technologies.

Market Trends

The development of Manned-Unmanned Teaming (MUM-T) architectures is reshaping aerial intelligence by pairing autonomous "loyal wingmen" with piloted aircraft. This concept enables air forces to utilize semi-autonomous systems as forward sensors that relay critical data without exposing human crews to air defenses, driving substantial investment in collaborative platforms. As noted by Army Recognition in May 2025 regarding the U.S. Air Force's testing of unmanned fighter jets to enhance F-22 and F-35 capabilities, the total planned funding for the Collaborative Combat Aircraft program from fiscal years 2025 to 2029 stands at 8.89 billion USD, reflecting the massive capital allocated to operationalizing these mixed-formation fleets.

Simultaneously, the adoption of High-Altitude Pseudo-Satellites (HAPS) for stratospheric surveillance is creating a new layer of persistent monitoring that bridges the gap between drones and satellites. Operating above weather systems, these solar-electric platforms provide continuous imagery over specific areas for months, offering station-keeping capabilities essential for long-term border security that satellites with limited dwell times cannot match. Highlighting this trend, Developing Telecoms reported in May 2025 that the solar-powered Zephyr HAPS aircraft successfully completed a continuous stratospheric flight lasting 67 days, demonstrating the unprecedented endurance available for prolonged intelligence missions.

Key Market Players

BAE Systems Plc.

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Israel Aerospace Industries Ltd.

Lockheed Martin Corporation

Raytheon Technologies Corporation

Northrop Grumman Corporation

Thales S.A.

L3 Harris Technologies, Inc.

Teledyne Technologies Incorporated.

Leica Geosystems AG.

Saab Group AB.

Report Scope

In this report, the Global Airborne Surveillance Market has been segmented into the following categories, in addition to the industry trends which have also been detailed below:

Airborne Surveillance Market, By Type

LiDAR

Radar

Imaging System

Airborne Surveillance Market, By Product Type

Manned System

Unmanned System

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  - India
  - Japan
  - Australia
  - South Korea
- South America
  - Brazil
  - Argentina
  - Colombia
- Middle East & Africa
  - South Africa
  - Saudi Arabia
  - UAE

Competitive Landscape

Company Profiles: Detailed analysis of the major companies present in the Global Airborne Surveillance Market.

Available Customizations:

Global Airborne Surveillance Market report with the given market data, TechSci Research offers customizations according to a company's specific needs. The following

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customization options are available for the report:

Company Information

Detailed analysis and profiling of additional market players (up to five).

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