+357 96 030922
info@marketpublishers.com

Electronic Warfare Market - Global Industry Size, Share, Trends, Opportunity, and Forecast, Segmented By Capability (Support, Attack, Protection), By Equipment (Jammers, Antennas, Radar Warning Receiver, Anti-Radiation Missiles, Directed Energy Weapon, CMDS, DIRCM, Others), By Platform (Air, Land, Naval, Space), By Region & Competition, 2021-2031F

https://marketpublishers.com/r/EC5D1B5F8A96EN.html
Date: January 2026
Pages: 188
Price: US$ 4,500.00 (Single User License)
ID: EC5D1B5F8A96EN

Abstracts

The Global Electronic Warfare Market is projected to expand from USD 30.67 Billion in 2025 to USD 47.68 Billion by 2031, registering a compound annual growth rate of 7.63%. This sector centers on the strategic utilization of the electromagnetic spectrum to safeguard friendly forces while detecting, deceiving, and disrupting adversary activities. Market growth is driven by intensifying geopolitical instability and a worldwide drive toward military modernization, with governments prioritizing investments to secure information superiority over peer competitors. According to the Aerospace, Security and Defence Industries Association of Europe, defense turnover in this sector rose by 13.8 percent in 2024, fueling the advancement of essential jamming and threat detection technologies for modern combat scenarios.

However, the market faces significant hurdles due to the fragmentation of the industrial base and supply chain. Inconsistent national standards and regulatory obstacles frequently hinder cross-border collaboration, resulting in duplicated efforts and delayed program execution. These inefficiencies place a strain on defense manufacturers and slow the delivery of critical electronic warfare assets. Consequently, the lack of streamlined cooperation and standardized processes threatens to impede the rapid

+357 96 030922
info@marketpublishers.com

deployment of capabilities necessary to address evolving security threats effectively.

Market Driver

Escalating geopolitical tensions and regional conflicts are the primary catalysts accelerating the demand for electronic warfare systems. As nations encounter growing conventional and asymmetric threats, there is a critical need to upgrade spectral dominance capabilities to neutralize adversary communications and radar effectively. This volatile security environment has led to a global surge in defense budgets; the Stockholm International Peace Research Institute reported a 6.8 percent real-term increase in military expenditure in April 2024. This influx of capital directly supports defense contractors, with Saab reporting an 85 percent increase in order bookings for the first half of 2024, highlighting the urgent global requirement for sophisticated defensive systems.

A second major driver is the integration of artificial intelligence and cognitive capabilities into electronic warfare architectures. Modern battlefields feature agile frequency-hopping signals that legacy systems struggle to counter, prompting a shift toward cognitive systems capable of autonomous threat identification. This transition necessitates substantial investment in machine learning algorithms to manage the electromagnetic spectrum, as evidenced by the U.S. Department of Defense allocating $1.8 billion in its fiscal year 2025 budget specifically for AI adoption. These technological advancements enable electronic warfare suites to adapt to enemy signatures in real-time, enhancing survivability and operational effectiveness in dense signal environments.

Market Challenge

The fragmentation of the industrial base and supply chain represents a significant barrier to the growth of the Global Electronic Warfare Market. Divergent national standards and complex regulatory frameworks often obstruct international collaboration, compelling manufacturers to navigate inconsistent compliance requirements and duplicate efforts. In a sector where systems depend on highly specialized components and precise integration, these inefficiencies create severe logistical bottlenecks. The resulting strain on resources frequently delays the production and delivery of critical jamming and detection assets, preventing companies from fulfilling contracts within projected timelines.

+357 96 030922
info@marketpublishers.com

This structural fragility limits market expansion by diminishing the resilience and capacity of the manufacturing ecosystem. The National Defense Industrial Association's 'Vital Signs 2024' report indicates that private sector respondents lost 26 percent of critical suppliers over the preceding three years. This contraction in the supplier network increases vulnerability to disruptions and extends lead times for advanced electronic warfare capabilities. Consequently, the inability to rapidly scale production to meet rising global demand directly constrains revenue realization and slows the overall development of the market.

Market Trends

The convergence of cyber and electronic warfare capabilities is fundamentally reshaping the tactical landscape, requiring defense strategies to view the electromagnetic spectrum and cyberspace as a unified maneuver space. This trend drives the deployment of integrated systems that can simultaneously jam radio frequencies and inject malicious code into adversary networks, thereby amplifying the impact of offensive operations. As communication and navigation systems become increasingly digitized, the overlap between jamming signals and cyber intrusions necessitates a holistic approach to spectral dominance. For instance, CACI International secured a $450 million contract in July 2024 to support U.S. Space Command operations that specifically address threats spanning space, cyber, and electronic warfare domains.

Simultaneously, the industry is transitioning toward software-defined and open architecture standards to mitigate the rapid obsolescence of legacy hardware. By adopting frameworks such as the Modular Open Systems Approach, manufacturers are decoupling hardware from software, allowing defense forces to efficiently update electronic warfare libraries with new threat profiles. This shift significantly reduces lifecycle costs and accelerates the deployment of countermeasures against agile frequency-hopping adversaries. Illustrating this trend, BAE Systems was awarded a $95 million contract in June 2024 to provide the U.S. Navy with systems featuring a flexible, open architecture designed to facilitate rapid modernization and the incorporation of third-party techniques.

Key Market Players

Lockheed Martin

Raytheon Technologies

+357 96 030922
info@marketpublishers.com

Northrop Grumman

BAE Systems

Thales Group

Saab AB

Leonardo S.p.A.

Elbit Systems

L3Harris Technologies

Israel Aerospace Industries

Report Scope

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

Electronic Warfare Market, By Capability

Support

Attack

Protection

Electronic Warfare Market, By Equipment

Jammers

Antennas

Radar Warning Receiver

+357 96 030922
info@marketpublishers.com

- Anti-Radiation Missiles
- Directed Energy Weapon
- CMDS
- DIRCM
- Others

Electronic Warfare Market, By Platform

- Air
- Land
- Naval
- Space

Electronic Warfare Market, By Region

- North America
  - United States
  - Canada
  - Mexico
- Europe
  - France
  - United Kingdom
  - Italy

+357 96 030922
info@marketpublishers.com

- Germany
- Spain

Asia Pacific

- China
- 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 Electronic Warfare Market.

Available Customizations:

+357 96 030922
info@marketpublishers.com

Global Electronic Warfare Market report with the given market data, TechSci Research offers customizations according to a company's specific needs. The following customization options are available for the report:

Company Information

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

+357 96 030922
info@marketpublishers.com

Contents

+357 96 030922
info@marketpublishers.com

6. NORTH AMERICA ELECTRONIC WARFARE MARKET OUTLOOK

7. EUROPE ELECTRONIC WARFARE MARKET OUTLOOK

+357 96 030922
info@marketpublishers.com

+357 96 030922
info@marketpublishers.com

8. ASIA PACIFIC ELECTRONIC WARFARE MARKET OUTLOOK

+357 96 030922
info@marketpublishers.com

9. MIDDLE EAST & AFRICA ELECTRONIC WARFARE MARKET OUTLOOK

+357 96 030922
info@marketpublishers.com

10. SOUTH AMERICA ELECTRONIC WARFARE MARKET OUTLOOK

11. MARKET DYNAMICS

+357 96 030922
info@marketpublishers.com

+357 96 030922
info@marketpublishers.com

+357 96 030922
info@marketpublishers.com

I would like to order

Product name: Electronic Warfare Market - Global Industry Size, Share, Trends, Opportunity, and Forecast, Segmented By Capability (Support, Attack, Protection), By Equipment (Jammers, Antennas, Radar Warning Receiver, Anti-Radiation Missiles, Directed Energy Weapon, CMDS, DIRCM, Others), By Platform (Air, Land, Naval, Space), By Region & Competition, 2021-2031F

Product link: https://marketpublishers.com/r/EC5D1B5F8A96EN.html

Price: US$ 4,500.00 (Single User License / Electronic Delivery)

If you want to order Corporate License or Hard Copy, please, contact our Customer Service:
info@marketpublishers.com

Payment

To pay by Credit Card (Visa, MasterCard, American Express, PayPal), please, click button on product page https://marketpublishers.com/r/EC5D1B5F8A96EN.html