

Air and Missile Defense Radar (AMDR) Market – Global Industry Size, Share, Trends, Opportunity, and Forecast, Segmented By Platform (Airborne, Land, Naval), By Radar Type (X Band Radar, Y Band Radar), By Application (Conventional, Ballistics Missile Defense), By Region & Competition, 2020-2030F

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Abstracts

The Global Air and Missile Defense Radar (AMDR) Market was valued at USD 7.89 Billion in 2024 and is expected to reach USD 11.05 Billion by 2030 with a CAGR of 6.57% during the forecast period. The global Air and Missile Defense Radar (AMDR) market is experiencing significant growth due to the increasing need for enhanced defense systems to counter evolving airborne and missile threats. As geopolitical tensions rise and missile technology advances, countries are investing heavily in modernizing their defense capabilities. AMDR's advanced features, such as high-resolution tracking, multifunctionality, and integration with other defense systems, make it an essential component for naval and military forces. Also, the growing demand for integrated defense solutions and the need for stronger defense infrastructure further fuel the expansion of the AMDR market globally.

Market Drivers

Rising Defense Budget Across the World

A key driving factor for the growth of the Air and Missile Defense Radar (AMDR) market is the rising defense budgets across the world. As a part of this, according to a recent study, as of April 2024, military spending by the USA rose by 2.3 per cent to reach USD 916 billion in 2023, representing 68 per cent of total NATO military spending. In 2023

most European NATO members increased their military expenditure. Their combined share of the NATO total was 28 per cent, the highest in a decade. The remaining 4 per cent came from Canada and Türkiye. As geopolitical tensions increase and security threats evolve, nations are prioritizing the modernization of their defense infrastructure. This includes investing in advanced radar systems, like AMDR, to enhance their capabilities in detecting, tracking, and engaging airborne and missile threats.

Governments are recognizing the necessity of strengthening their missile defense systems to protect critical assets, particularly in naval forces. AMDR offers advanced features such as high-resolution tracking, multifunctionality, and real-time threat engagement, making it a crucial component in next-generation defense strategies. With the growing reliance on advanced technologies for national security, defense budgets are expanding to support the procurement of state-of-the-art systems, including AMDR. The global emphasis on cybersecurity, regional conflicts, and the proliferation of missile technologies further propel investments in missile defense infrastructure. Countries are increasingly investing in air and missile defense solutions to protect both military and civilian assets from a wide range of evolving threats. This trend is expected to continue driving demand for AMDR systems, as they offer a robust, integrated defense capability, ensuring their prominence in the market for years to come.

Increasing Government Investment Across Aviation Sector

Increasing government investment across the aviation sector is a significant driving factor for the growth of the Air and Missile Defense Radar (AMDR) market. As a part of this, as of May 2024, The Uttar Pradesh government hopes to attract private investment of USD 2 billion (about Rs 16,000 crore) in the civil aviation sector. The proposed investment can be utilized to build and repair existing airstrips, as well as promote ancillary sectors including aviation training, aircraft maintenance, and aerospaces. The state plans to operationalize 225 routes under the Regional Connectivity Scheme (RCS), in addition to 14 state-owned airstrips that require rapid construction. As aviation becomes more critical to national security and global defense strategies, governments are prioritizing the development and procurement of advanced defense technologies, including AMDR systems, to protect both military and civilian aviation infrastructure.

Aviation threats, such as missile attacks or hostile airborne targets, have prompted governments to invest in sophisticated radar systems capable of detecting and intercepting these threats in real-time. AMDR's capabilities, such as high-resolution tracking, multitarget engagement, and integration with missile defense systems, make it

an ideal solution for aviation protection. AMDR is not only critical for naval defense but also increasingly important in safeguarding airports, air traffic control systems, and even airborne platforms from emerging threats. Government investments are further amplified by the growing focus on national defense modernization programs, where advanced air and missile defense systems are considered top priorities. This includes upgrading existing military assets and enhancing radar technologies to stay ahead of emerging missile and drone threats. With aviation security at the forefront of defense strategies, the growing investments in the sector will continue to drive the demand for AMDR systems, making them integral to next-generation defense initiatives globally.

Growing Geopolitical Tension

Growing geopolitical tensions are a significant driver of the Air and Missile Defense Radar (AMDR) market. As nations face rising security threats from adversaries and regional conflicts, there is an increasing demand for advanced defense systems capable of protecting against a wide range of airborne and missile threats. AMDR plays a crucial role in addressing these challenges by providing advanced detection, tracking, and engagement capabilities, making it essential for safeguarding both military and civilian assets.

Heightened tensions in areas such as the Middle East, the South China Sea, and Eastern Europe, where missile and air threats are particularly prevalent, are prompting governments to invest in state-of-the-art radar systems. These systems are vital for identifying and countering emerging threats like ballistic missiles, cruise missiles, and drones. AMDR's multifunctional radar capabilities enable real-time threat analysis and multi-target engagement, making it a critical tool in modern defense strategies. As countries seek to enhance their military readiness and defense posture, the demand for AMDR systems is rising. The growing need for reliable, integrated, and capable air and missile defense solutions to maintain regional stability and protect national security is expected to continue driving investments in AMDR technologies. Consequently, the AMDR market is set to expand as global defense priorities shift toward more advanced radar and missile defense capabilities.

Key Market Challenges

High Cost of Maintenance

A significant challenge facing the Air and Missile Defense Radar (AMDR) market is the high cost of maintenance. AMDR systems are complex, advanced technologies that

require continuous upkeep to ensure optimal performance. This includes regular calibration, hardware upgrades, software updates, and periodic testing to address any potential vulnerabilities or malfunctions. The specialized components and high-level expertise required for maintenance further increase costs, posing a financial burden for military organizations, particularly those with large fleets of radar systems.

Also, as AMDR systems are integrated into broader defense platforms, such as naval vessels, the maintenance extends beyond the radar itself, encompassing entire defense systems. This complexity raises the total cost of ownership and can lead to longer downtimes during maintenance periods, affecting operational readiness. For countries with limited defense budgets, the high maintenance costs may limit the widespread adoption of AMDR systems or delay upgrades to existing systems. This challenge requires manufacturers and governments to explore cost-effective solutions, such as streamlined maintenance procedures, more durable components, and advanced predictive maintenance technologies, to mitigate the financial impact while ensuring the continued functionality of AMDR systems.

Strict Government Norms

Strict government norms present a significant challenge for the Air and Missile Defense Radar (AMDR) market. Many countries have stringent regulatory requirements for defense technologies, particularly those related to national security, defense procurement, and export controls. These regulations often involve extensive testing, certification processes, and compliance with both domestic and international standards, which can delay the development, deployment, and upgrade of AMDR systems.

For instance, defense contractors must adhere to complex standards regarding data security, interoperability with existing military infrastructure, and operational performance. Also, export restrictions on sensitive defense technologies can limit the ability to sell AMDR systems to international customers, reducing market opportunities for manufacturers. Also, as defense technologies become more advanced, governments may impose stricter cybersecurity measures to prevent unauthorized access or hacking of critical radar systems. These constraints can result in longer development timelines and increased costs, making it more difficult for companies to keep up with evolving defense needs. Navigating these regulatory challenges requires defense contractors to invest significant resources in compliance processes, legal consultations, and securing necessary approvals, all of which can impact market growth and the overall competitiveness of AMDR systems.

Key Market Trends

Rising Shift Towards Digital & Software-Defined Radar

A significant trend in the Air and Missile Defense Radar (AMDR) market is the rising shift toward digital and software-defined radar technologies. This trend is driven by the need for greater flexibility, scalability, and adaptability in defense systems. Digital and software-defined radars offer significant advantages over traditional analog systems, including the ability to update and modify the radar's capabilities through software rather than hardware changes. This makes it easier and more cost-effective to upgrade systems to address emerging threats without needing a complete hardware overhaul.

Software-defined radar systems can be quickly reprogrammed to optimize performance for different mission requirements, such as detecting new types of missiles or improving clutter suppression. Also, these systems enable better signal processing, resulting in improved resolution, detection accuracy, and reduced false alarms. The ability to rapidly deploy software updates also enhances the operational readiness of AMDR systems, allowing for quicker responses to evolving threats. As defense budgets remain constrained, the flexibility and efficiency of software-defined radar are becoming increasingly attractive, ensuring that AMDR systems can keep pace with rapidly advancing missile and air defense technologies while reducing maintenance and upgrade costs. This trend is expected to continue shaping the future of AMDR development.

Growing Demand for Enhanced Detection Capabilities

A key trend in the Air and Missile Defense Radar (AMDR) market is the growing demand for enhanced detection capabilities. As the range and sophistication of airborne and missile threats continue to evolve, military forces are increasingly seeking radar systems that can detect, track, and engage a wider variety of targets with higher precision. This includes the need to counter advanced threats such as hypersonic missiles, stealth aircraft, and drones.

AMDR systems are being developed to offer improved range, resolution, and target discrimination. This enables them to identify and engage multiple threats simultaneously, even in cluttered or jammed environments. Enhanced detection capabilities also include greater accuracy in distinguishing between real threats and decoys, reducing false alarms and improving decision-making in critical defense situations. The ability to track fast-moving, maneuvering targets, such as hypersonic

missiles, is becoming a priority, driving innovations in radar technology, such as advanced signal processing and the use of higher-frequency bands. Also, multi-function radar systems that combine air and missile defense capabilities in one platform are becoming increasingly popular due to their cost-effectiveness and operational efficiency. As threats become more complex, the demand for AMDR systems with enhanced detection capabilities is expected to grow, making it a major trend in the market.

Rising Partnership Activities Between Defense Contractors & Government

Rising partnership activities between defense contractors and governments are a prominent trend in the Air and Missile Defense Radar (AMDR) market. As military forces seek to modernize and enhance their defense capabilities, close collaboration between contractors and government agencies is becoming increasingly essential for developing advanced radar systems that meet evolving security needs. These partnerships allow for a more tailored approach to AMDR development, ensuring that the radar systems align with specific operational requirements and strategic defense goals. As of June 2023, The India-U.S. Defense Acceleration Ecosystem (INDUS-X) was launched by the US Department of Defense (DoD) and the Indian Ministry of Defense (MoD), with a bilateral partnership agenda in mind. INDUS-X has continued to promote the commitment of US and Indian national security advisors to develop a defense innovation bridge between the two nations as part of the Critical and Emerging Technology Initiative (iCET). With the backing of the US and Indian governments, INDUS-X encourages relationships between large and small defense firms in the US and India, incubators and accelerators, investors, and universities.

Governments and defense contractors are working together to co-develop cutting-edge technologies, share expertise, and pool resources for faster innovation. This collaboration also helps streamline the procurement process, ensuring that AMDR systems are integrated seamlessly into existing defense platforms, such as naval vessels or ground-based defense systems. Also, these partnerships often involve joint funding initiatives, which can help mitigate the high costs associated with advanced radar technology development. They also support research and development of next-generation radar systems, which are critical for staying ahead of emerging threats, including hypersonic missiles, drones, and sophisticated electronic warfare tactics. As defense budgets expand globally, the trend of increased cooperation between defense contractors and governments is expected to continue, accelerating advancements in AMDR technology. In August 2024, DIU and GSA collaborated to transform successful technological prototypes into scalable solutions for the Department of Defense (DoD) and other government agencies. DIU focuses on addressing national security concerns

by collaborating with commercial technology suppliers, particularly nontraditional defense contractors. The Commercial Solutions Opening (CSO) procedure allows DIU to quickly prototype and acquire dual-use technology.

Segmental Insights

Platform Insights

The Naval segment dominated the Global Air and Missile Defense Radar (AMDR) Market, due to the increasing need for advanced radar systems to protect naval assets from evolving air and missile threats. Navies worldwide are investing in AMDR to enhance the defense capabilities of their ships, particularly in detecting and intercepting missiles, aircraft, and drones. The integration of AMDR with systems like Aegis Combat is a key driver of this growth. As maritime security concerns rise, naval forces are prioritizing the deployment of these advanced radar technologies to ensure enhanced situational awareness and rapid response in defense scenarios.

Regional Insights

North America was the dominating region in the Global Air and Missile Defense Radar (AMDR) Market, driven by the United States' significant defense budget and ongoing investment in advanced military technologies. The U.S. military, particularly the Navy, heavily relies on AMDR systems to enhance the protection of naval assets against a range of air and missile threats. Also, North American defense contractors are at the forefront of developing cutting-edge radar technologies, further bolstering market growth. The region's strategic focus on modernizing defense capabilities, alongside increasing geopolitical tensions, continues to drive demand for AMDR systems.

Key Market Players

Hensoldt AG

Israel Aerospace Industries

Leonardo S.p.A.

Lockheed Martin Corporation

Northrop Grumman

RTX Corporation

Rheinmetall AG

Saab AB

Terma Group

Thales S.A.

Report Scope:

In this report, the global Air and Missile Defense Radar (AMDR) Market has been segmented into the following categories, in addition to the industry trends which have also been detailed below:

Air and Missile Defense Radar (AMDR) Market, By Platform:

Airborne

Land

Naval

Air and Missile Defense Radar (AMDR) Market, By Radar Type:

X Band Radar

Y Band Radar

Air and Missile Defense Radar (AMDR) Market, By Application:

Conventional

Ballistics Missile Defense

Air and Missile Defense Radar (AMDR) Market, By Region:

North America

United States

Canada

Mexico

Europe & CIS

France

Germany

Spain

Italy

United Kingdom

Asia-Pacific

China

Japan

India

Vietnam

South Korea

Australia

Thailand

Middle East & Africa

South Africa

Saudi Arabia

UAE

Turkey

South America

Brazil

Argentina

Competitive Landscape

Company Profiles: Detailed analysis of the major companies presents in the global Air and Missile Defense Radar (AMDR) Market.

Available Customizations:

Global Air and Missile Defense Radar (AMDR) 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).

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 - 13.1.5.4. Key Market Focus & Geographical Presence
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14. STRATEGIC RECOMMENDATIONS/ACTION PLAN

- 14.1. Key Focus Areas
- 14.2. Target Platform
- 14.3. Target Application

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