

Anti Jamming Market– Global Industry Size, Share, Trends, Opportunity, and Forecast. Segmented By Receiver Type (Military & Government Grade and Commercial Transportation Grade), By Anti Jamming Technique (Nulling Technique, Beam Steering Technique and Civilian Techniques), By Application (Flight Control, Surveillance & Reconnaissance, Position and Others), By End User (Military and Civilian), By Region, By Company and By Geography, Forecast & Opportunities, 2018-2028.

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Abstracts

The Global Anti Jamming Market was valued at USD 4.2 Billion in 2022 and growing at a rate of 13.4% during the forecast period. The global anti-jamming market is currently experiencing significant growth, driven by a confluence of factors that underscore the critical importance of secure and reliable navigation and communication systems in today's interconnected world. As our reliance on Global Positioning System (GPS) technology and various communication platforms continues to expand across industries such as defense, aerospace, transportation, and telecommunications, the vulnerability to jamming and spoofing attacks has become increasingly evident. This heightened threat landscape has propelled the demand for cutting-edge anti-jamming solutions. Anti-jamming technologies are designed to safeguard GPS signals and communication channels from disruptions caused by intentional interference or jamming, ensuring uninterrupted operations and critical mission success. As nations and organizations recognize the strategic significance of resilient and secure positioning, navigation, and timing (PNT) capabilities, investments in anti-jamming solutions have surged.

Furthermore, the global anti-jamming market is benefiting from advancements in technology, including the development of more sophisticated anti-jamming algorithms and the integration of anti-spoofing techniques. These innovations are fostering market growth by enhancing the robustness and effectiveness of anti-jamming solutions, further solidifying their role in safeguarding critical infrastructure and operations. In this evolving landscape, the global anti-jamming market is poised for continued expansion, offering lucrative opportunities for companies at the forefront of this vital sector.

Key Market Drivers

Growing Reliance on GPS Technology

The growing reliance on GPS (Global Positioning System) technology is a paramount driver fueling the expansion of the global anti-jamming market. In an era characterized by the pervasive integration of GPS into an array of critical applications spanning defense, transportation, agriculture, and telecommunications, the need to safeguard these systems from intentional interference has become more pressing than ever. GPS technology has transcended its initial military applications to permeate virtually every facet of modern life, providing precision in location-based services, navigation for autonomous vehicles, synchronization of financial transactions, and the backbone for efficient supply chain logistics. However, this increased reliance on GPS has simultaneously exposed vulnerabilities, as malicious actors have sought to disrupt these indispensable signals through jamming and spoofing techniques. As a result, businesses, governments, and military entities are recognizing the imperative of ensuring the continuity of GPS-dependent operations. This recognition has led to a surge in demand for advanced anti-jamming solutions that fortify GPS signals, protect against interference, and uphold the integrity of critical services. Consequently, the growing reliance on GPS technology not only underscores the significance of the anti-jamming market but also propels it forward as an essential component of safeguarding the functionality and security of our increasingly interconnected world, where the uninterrupted availability of accurate positioning and timing data is pivotal for the success and resilience of a myriad of applications and industries.

Rising Threat of Jamming and Spoofing

The escalating threat of jamming and spoofing attacks serves as a potent catalyst propelling the global anti-jamming market into prominence. In an era characterized by pervasive connectivity and the reliance on critical navigation and communication systems, the vulnerability of these systems to deliberate interference has become

alarmingly apparent. Jamming, the act of broadcasting powerful signals to drown out or disrupt legitimate GPS or communication signals, poses a grave risk to sectors ranging from defense and aviation to agriculture and maritime, where precision and accuracy are non-negotiable. Spoofing, on the other hand, involves deceiving GPS receivers by broadcasting counterfeit signals, leading to inaccurate positioning and potentially catastrophic consequences. These threats, often employed by malicious actors seeking to disrupt military operations or compromise the integrity of financial transactions and transportation networks, have spurred a demand surge for cutting-edge anti-jamming technologies. Organizations and governments recognize that securing critical infrastructure and operations against jamming and spoofing is no longer a luxury but a necessity in safeguarding national security, economic stability, and public safety. Consequently, the rising threat of jamming and spoofing is the driving force behind the growth of the global anti-jamming market, compelling innovation and investment in robust solutions that ensure the resilience and reliability of navigation and communication systems, and ultimately fortifying the foundation upon which our modern, interconnected world rests.

Defense and Military Applications

The defense and military applications of anti-jamming technology represent a pivotal driver behind the burgeoning global anti-jamming market. In the realm of national security and military operations, secure and reliable communication and navigation systems are indispensable for mission success. As modern warfare increasingly relies on GPS-guided munitions, unmanned aerial vehicles (UAVs), and precision-guided logistics, the vulnerability of these systems to jamming and spoofing attacks has become a grave concern. Military modernization initiatives worldwide are driving the adoption of advanced anti-jamming solutions, which not only enhance the resilience of military communications but also bolster the precision and effectiveness of weapons systems. These solutions are instrumental in ensuring that critical military assets remain operational in the face of deliberate interference, thereby safeguarding national defense capabilities. Consequently, the defense and military sectors continue to represent a significant and enduring driver of the global anti-jamming market, with ongoing research and development efforts dedicated to countering evolving threats and maintaining a strategic edge in the increasingly complex and contested landscape of modern warfare.

Commercial Applications

Commercial applications have emerged as a compelling force behind the growth of the global anti-jamming market. In a world where precise location data and uninterrupted

communication are fundamental to various industries, including transportation, agriculture, finance, and autonomous systems, the dependence on GPS and communication technologies has never been more pronounced. Any disruption to these services due to jamming or spoofing can lead to substantial financial losses, operational inefficiencies, and even safety risks. As sectors like autonomous vehicles, precision agriculture, and supply chain management increasingly rely on GPS technology for real-time decision-making and operations, the need to secure these systems from interference has become paramount. This has driven businesses and organizations to invest in anti-jamming solutions that ensure the continuous availability and accuracy of GPS and communication signals. The commercial sector's growing recognition of the importance of anti-jamming in safeguarding operations and enhancing efficiency not only bolsters the market but also reflects the pivotal role these technologies play in maintaining competitiveness and resilience across a broad spectrum of industries in today's interconnected and data-driven business landscape.

Key Market Challenges

Evolving Threat Landscape

The Global Anti-Jamming Market confronts an ever-evolving threat landscape characterized by the continuous development and sophistication of jamming and spoofing technologies. As malicious actors become more adept at disrupting GPS and communication signals, the challenge lies in staying one step ahead to ensure the effectiveness of anti-jamming solutions. This demands ongoing research and development efforts to identify and counter emerging threats, adapt algorithms, and devise innovative anti-jamming techniques. Staying ahead of these adversaries is critical to maintaining the market's relevance and providing reliable protection to industries and organizations that rely on uninterrupted access to critical positioning and communication systems.

Complexity of Multi-constellation Environments

In an era of multi-constellation satellite systems, achieving seamless integration and compatibility across diverse navigation systems like GPS, GLONASS, Galileo, and BeiDou presents a significant challenge. These constellations operate with distinct frequencies and signals, making it complex to design anti-jamming solutions that effectively counter threats across all of them. Manufacturers must invest in the development of adaptable, multi-constellation anti-jamming technologies capable of ensuring consistent protection and performance. Solving this integration puzzle is

essential to meet the growing demand for global coverage and resilient anti-jamming solutions, especially in applications that rely on multiple navigation systems.

Regulatory Compliance and Export Control

Navigating the intricate web of international regulations and export controls represents a substantial challenge for the global anti-jamming market. The export of anti-jamming technologies is often subject to stringent regulations, necessitating compliance with national and international export laws. These regulatory hurdles can impede market growth, particularly for manufacturers seeking to expand their reach into international markets. Navigating the complex terrain of export controls while ensuring that anti-jamming solutions remain accessible to authorized users is a delicate balance that requires careful planning and regulatory expertise. Successfully addressing this challenge will allow manufacturers to tap into a broader customer base while adhering to legal and ethical compliance requirements.

Rapid Technological Advancements

The rapid pace of technological advancements, while driving innovation, also presents challenges for the anti-jamming market. As technology evolves, anti-jamming solutions must keep up with the latest developments in jamming and spoofing techniques. Manufacturers need to continuously invest in research and development to ensure that their products remain effective and relevant in the face of emerging threats. Additionally, the need for backward compatibility with existing systems adds another layer of complexity, as manufacturers strive to balance cutting-edge capabilities with seamless integration into legacy infrastructure. Addressing this challenge requires a commitment to staying at the forefront of technology while offering solutions that seamlessly coexist with the systems in place.

Interoperability and Integration with Existing Infrastructure

The lack of universal standards and protocols for anti-jamming solutions poses an interoperability challenge, impacting the market's ability to seamlessly integrate with diverse existing infrastructure. Achieving compatibility among different anti-jamming systems and ensuring smooth integration with various navigation and communication devices is essential. The development of standardized interfaces and protocols is crucial to facilitate the adoption of anti-jamming solutions across industries. Collaboration among stakeholders and industry players is imperative to establish these much-needed standards, enabling organizations to leverage anti-jamming technology

efficiently and effectively.

Key Market Trends

Advanced Anti-Jamming Techniques

A pivotal and transformative trend in the Global Anti-Jamming Market revolves around the continuous advancement of anti-jamming techniques. In response to evolving jamming and spoofing threats, the market is witnessing a surge in innovative approaches and technologies aimed at enhancing the resilience and effectiveness of anti-jamming solutions. Manufacturers are investing heavily in research and development to develop adaptive, multifaceted anti-jamming algorithms capable of identifying and countering a broad spectrum of jamming signals. This trend is driven by the imperative to stay ahead of malicious actors who constantly seek new ways to disrupt GPS and communication signals. As a result, the market is experiencing a paradigm shift towards more robust and sophisticated anti-jamming technologies, ensuring the reliability and integrity of critical navigation and communication systems across various industries.

Integration with Emerging Navigation Technologies

The integration of anti-jamming solutions with emerging navigation technologies represents a significant trend shaping the Global Anti-Jamming Market. With the rapid development of alternative navigation systems such as eLoran, quantum positioning, and autonomous vehicle platforms, there is a growing need for anti-jamming capabilities that seamlessly adapt to and protect these diversified systems. Manufacturers are working to ensure that anti-jamming solutions are compatible with and complementary to these emerging technologies, bolstering the market's relevance in an increasingly diverse and interconnected navigation landscape. This trend reflects the market's commitment to providing comprehensive protection across a wide spectrum of navigation platforms, promoting reliability and security in an era of technological innovation.

Emphasis on Cybersecurity Integration

The convergence of anti-jamming technology and cybersecurity is an evolving trend that is gaining prominence within the Global Anti-Jamming Market. As jamming and spoofing attacks increasingly become vectors for cybersecurity breaches, the market is witnessing a heightened focus on integrating anti-jamming solutions with broader

cybersecurity strategies. Organizations and governments are recognizing the interconnectedness of these threats and the need for holistic protection of critical infrastructure. This trend involves the development of anti-jamming solutions that not only defend against signal interference but also incorporate robust encryption, authentication, and anomaly detection capabilities to thwart cyberattacks. The market's response to this trend underscores the recognition of the symbiotic relationship between anti-jamming and cybersecurity, with integrated solutions offering a comprehensive defense against both physical and digital threats.

Global Collaboration and Standardization

The absence of universally accepted industry standards within the Global Anti-Jamming Market presents a notable challenge. However, it also fosters a trend towards increased global collaboration and standardization efforts. Stakeholders from various industries and regions are recognizing the importance of establishing common criteria for anti-jamming solutions, including compatibility with different navigation systems, signal frequencies, and communication protocols. Collaborative initiatives are emerging to bridge these gaps and define industry-wide standards, enhancing the interoperability and adoption of anti-jamming technologies. This trend highlights the industry's commitment to providing consistent and reliable anti-jamming solutions that can be seamlessly integrated into diverse applications, ultimately strengthening the market's global presence and impact.

Segmental Insights

End User Insights

In 2022, the 'Military' end-user segment dominated the Global Anti-Jamming Market and is expected to maintain its dominance throughout the forecast period. The military sector has consistently been at the forefront of adopting advanced anti-jamming technologies due to the critical role of secure and reliable communication and navigation systems in defense operations. As modern warfare becomes increasingly reliant on GPS-guided munitions, unmanned aerial vehicles (UAVs), and network-centric warfare, the vulnerability to jamming and spoofing attacks has become a top concern for military forces worldwide. Consequently, substantial investments have been directed toward cutting-edge anti-jamming solutions that can protect military assets and missions from intentional interference. The military's commitment to staying ahead of evolving threats and maintaining the highest levels of operational readiness ensures that the 'Military' end-user segment will remain the dominant force driving the Global

Anti-Jamming Market. With defense modernization efforts ongoing globally and the continuous evolution of jamming and spoofing techniques, the demand for anti-jamming solutions in the military sector is set to remain robust in the forecast period, solidifying its dominance in the market.

Application Insights

The 'Flight Control' application segment dominated the Global Anti-Jamming Market and is anticipated to maintain its dominance throughout the forecast period. The aviation industry's increasing reliance on GPS and communication systems for safe and efficient flight operations has driven the demand for robust anti-jamming solutions. Flight control systems heavily depend on precise positioning and navigation data, making them particularly vulnerable to jamming and spoofing threats. To ensure the safety of passengers and the successful execution of flight missions, the aviation sector has prioritized investments in advanced anti-jamming technologies. These solutions not only protect against signal interference but also enhance the resilience of flight control systems. As air traffic continues to grow globally and military aviation remains a critical component of national defense, the Flight Control application segment is poised to maintain its dominance, with sustained investments in anti-jamming solutions to ensure the reliability and security of aviation operations. This trend is expected to persist in the forecast period as aviation technology advances and the need for uninterrupted, secure communication and navigation in the skies remains paramount.

Regional Insights

North America emerged as the dominant region in the Global Anti-Jamming Market, and it is anticipated to maintain its leadership throughout the forecast period. Several factors contribute to North America's stronghold in this market. Firstly, the region is home to some of the world's largest defense and aerospace industries, leading to substantial investments in advanced anti-jamming technologies for military applications. Secondly, North America has a significant presence in the commercial sector, including transportation, agriculture, and telecommunications, where the reliance on GPS and communication systems is substantial. This dual demand from both the military and civilian sectors has propelled the growth of the anti-jamming market in the region. Furthermore, North America boasts a robust ecosystem of research and development, with numerous technology companies and defense contractors dedicated to enhancing anti-jamming solutions. The region's commitment to innovation and addressing evolving threats ensures its continued dominance in the anti-jamming market. Additionally, strong governmental support for defense modernization and critical infrastructure

protection contributes to the market's growth. Moreover, North America's geopolitical landscape and security concerns underscore the importance of secure positioning, navigation, and communication systems, further fueling the demand for anti-jamming solutions. As jamming and spoofing threats continue to evolve globally, North America's role in driving innovation and providing comprehensive anti-jamming solutions is expected to solidify its dominant position in the Global Anti-Jamming Market during the forecast period.

Key Market Players

Raytheon Technologies Corporation

BAE Systems plc

Northrop Grumman Corporation

Thales Group

The Boeing Company

Lockheed Martin Corporation

NovAtel Inc. (Acquired by Hexagon AB)

L3Harris Technologies, Inc.

Cobham plc (Now part of Advent International)

Rockwell Collins, Inc.

Report Scope:

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

Global Anti Jamming Market, By Receiver Type:

Military & Government Grade

Commercial Transportation Grade

Global Anti Jamming Market, By Application:

Flight Control

Surveillance & Reconnaissance

Position and Others

Global Anti Jamming Market, By End User:

Military

Civilian

Global Anti Jamming Market, By Anti Jamming Technique:

Nulling Technique

Beam Steering Technique

Civilian Techniques

Global Anti Jamming Market, By Region:

North America

Europe

South America

Middle East & Africa

Asia Pacific

Competitive Landscape

Company Profiles: Detailed analysis of the major companies present in the Global Anti Jamming Market.

Available Customizations:

Global Anti Jamming Market report with the given market data, Tech Sci 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).

Contents

1. PRODUCT OVERVIEW

- 1.1. Market Definition
- 1.2. Scope of the Market
 - 1.2.1. Markets Covered
 - 1.2.2. Years Considered for Study
 - 1.2.3. Key Market Segmentations

2. RESEARCH METHODOLOGY

- 2.1. Baseline Methodology
- 2.2. Key Industry Partners
- 2.3. Major Association and Secondary Sources
- 2.4. Forecasting Methodology
- 2.5. Data Triangulation & Validation
- 2.6. Assumptions and Limitations

3. EXECUTIVE SUMMARY

4. IMPACT OF COVID-19 ON GLOBAL ANTI JAMMING MARKET

5. VOICE OF CUSTOMER

6. GLOBAL ANTI JAMMING MARKET OVERVIEW

7. GLOBAL ANTI JAMMING MARKET OUTLOOK

- 7.1. Market Size & Forecast
 - 7.1.1. By Value
- 7.2. Market Share & Forecast
 - 7.2.1. By Receiver Type (Military & Government Grade and Commercial Transportation Grade)
 - 7.2.2. By Anti Jamming Technique (Nulling Technique, Beam Steering Technique and Civilian Techniques)
 - 7.2.3. By Application (Flight Control, Surveillance & Reconnaissance, Position and Others)
 - 7.2.4. By End User (Military and Civilian)

7.2.5. By Region (North America, Europe, South America, Middle East & Africa, Asia Pacific)

7.3. By Company (2022)

7.4. Market Map

8. NORTH AMERICA ANTI JAMMING MARKET OUTLOOK

8.1. Market Size & Forecast

8.1.1. By Value

8.2. Market Share & Forecast

8.2.1. By Receiver Type

8.2.2. By Anti Jamming Technique

8.2.3. By Application

8.2.4. By End User

8.2.5. By Country

8.2.5.1. United States Anti Jamming Market Outlook

8.2.5.1.1. Market Size & Forecast

8.2.5.1.1.1. By Value

8.2.5.1.2. Market Share & Forecast

8.2.5.1.2.1. By Receiver Type

8.2.5.1.2.2. By Anti Jamming Technique

8.2.5.1.2.3. By Application

8.2.5.1.2.4. By End User

8.2.5.2. Canada Anti Jamming Market Outlook

8.2.5.2.1. Market Size & Forecast

8.2.5.2.1.1. By Value

8.2.5.2.2. Market Share & Forecast

8.2.5.2.2.1. By Receiver Type

8.2.5.2.2.2. By Anti Jamming Technique

8.2.5.2.2.3. By Application

8.2.5.2.2.4. By End User

8.2.5.3. Mexico Anti Jamming Market Outlook

8.2.5.3.1. Market Size & Forecast

8.2.5.3.1.1. By Value

8.2.5.3.2. Market Share & Forecast

8.2.5.3.2.1. By Receiver Type

8.2.5.3.2.2. By Anti Jamming Technique

8.2.5.3.2.3. By Application

8.2.5.3.2.4. By End User

9. EUROPE ANTI JAMMING MARKET OUTLOOK

9.1. Market Size & Forecast

9.1.1. By Value

9.2. Market Share & Forecast

9.2.1. By Receiver Type

9.2.2. By Anti Jamming Technique

9.2.3. By Application

9.2.4. By End User

9.2.5. By Country

9.2.5.1. Germany Anti Jamming Market Outlook

9.2.5.1.1. Market Size & Forecast

9.2.5.1.1.1. By Value

9.2.5.1.2. Market Share & Forecast

9.2.5.1.2.1. By Receiver Type

9.2.5.1.2.2. By Anti Jamming Technique

9.2.5.1.2.3. By Application

9.2.5.1.2.4. By End User

9.2.5.2. France Anti Jamming Market Outlook

9.2.5.2.1. Market Size & Forecast

9.2.5.2.1.1. By Value

9.2.5.2.2. Market Share & Forecast

9.2.5.2.2.1. By Receiver Type

9.2.5.2.2.2. By Anti Jamming Technique

9.2.5.2.2.3. By Application

9.2.5.2.2.4. By End User

9.2.5.3. United Kingdom Anti Jamming Market Outlook

9.2.5.3.1. Market Size & Forecast

9.2.5.3.1.1. By Value

9.2.5.3.2. Market Share & Forecast

9.2.5.3.2.1. By Receiver Type

9.2.5.3.2.2. By Anti Jamming Technique

9.2.5.3.2.3. By Application

9.2.5.3.2.4. By End User

9.2.5.4. Italy Anti Jamming Market Outlook

9.2.5.4.1. Market Size & Forecast

9.2.5.4.1.1. By Value

9.2.5.4.2. Market Share & Forecast

- 9.2.5.4.2.1. By Receiver Type
- 9.2.5.4.2.2. By Anti Jamming Technique
- 9.2.5.4.2.3. By Application
- 9.2.5.4.2.4. By End User
- 9.2.5.5. Spain Anti Jamming Market Outlook
 - 9.2.5.5.1. Market Size & Forecast
 - 9.2.5.5.1.1. By Value
 - 9.2.5.5.2. Market Share & Forecast
 - 9.2.5.5.2.1. By Receiver Type
 - 9.2.5.5.2.2. By Anti Jamming Technique
 - 9.2.5.5.2.3. By Application
 - 9.2.5.5.2.4. By End User

10. SOUTH AMERICA ANTI JAMMING MARKET OUTLOOK

- 10.1. Market Size & Forecast
 - 10.1.1. By Value
- 10.2. Market Share & Forecast
 - 10.2.1. By Receiver Type
 - 10.2.2. By Anti Jamming Technique
 - 10.2.3. By Application
 - 10.2.4. By End User
 - 10.2.5. By Country
 - 10.2.5.1. Brazil Anti Jamming Market Outlook
 - 10.2.5.1.1. Market Size & Forecast
 - 10.2.5.1.1.1. By Value
 - 10.2.5.1.2. Market Share & Forecast
 - 10.2.5.1.2.1. By Receiver Type
 - 10.2.5.1.2.2. By Anti Jamming Technique
 - 10.2.5.1.2.3. By Application
 - 10.2.5.1.2.4. By End User
 - 10.2.5.2. Colombia Anti Jamming Market Outlook
 - 10.2.5.2.1. Market Size & Forecast
 - 10.2.5.2.1.1. By Value
 - 10.2.5.2.2. Market Share & Forecast
 - 10.2.5.2.2.1. By Receiver Type
 - 10.2.5.2.2.2. By Anti Jamming Technique
 - 10.2.5.2.2.3. By Application
 - 10.2.5.2.2.4. By End User

10.2.5.3. Argentina Anti Jamming Market Outlook

10.2.5.3.1. Market Size & Forecast

10.2.5.3.1.1. By Value

10.2.5.3.2. Market Share & Forecast

10.2.5.3.2.1. By Receiver Type

10.2.5.3.2.2. By Anti Jamming Technique

10.2.5.3.2.3. By Application

10.2.5.3.2.4. By End User

11. MIDDLE EAST & AFRICA ANTI JAMMING MARKET OUTLOOK

11.1. Market Size & Forecast

11.1.1. By Value

11.2. Market Share & Forecast

11.2.1. By Receiver Type

11.2.2. By Anti Jamming Technique

11.2.3. By Application

11.2.4. By End User

11.2.5. By Country

11.2.5.1. Saudi Arabia Anti Jamming Market Outlook

11.2.5.1.1. Market Size & Forecast

11.2.5.1.1.1. By Value

11.2.5.1.2. Market Share & Forecast

11.2.5.1.2.1. By Receiver Type

11.2.5.1.2.2. By Anti Jamming Technique

11.2.5.1.2.3. By Application

11.2.5.1.2.4. By End User

11.2.5.2. UAE Anti Jamming Market Outlook

11.2.5.2.1. Market Size & Forecast

11.2.5.2.1.1. By Value

11.2.5.2.2. Market Share & Forecast

11.2.5.2.2.1. By Receiver Type

11.2.5.2.2.2. By Anti Jamming Technique

11.2.5.2.2.3. By Application

11.2.5.2.2.4. By End User

11.2.5.3. South Africa Anti Jamming Market Outlook

11.2.5.3.1. Market Size & Forecast

11.2.5.3.1.1. By Value

11.2.5.3.2. Market Share & Forecast

- 11.2.5.3.2.1. By Receiver Type
- 11.2.5.3.2.2. By Anti Jamming Technique
- 11.2.5.3.2.3. By Application
- 11.2.5.3.2.4. By End User

12. ASIA PACIFIC ANTI JAMMING MARKET OUTLOOK

12.1. Market Size & Forecast

- 12.1.1. By Receiver Type
- 12.1.2. By Anti Jamming Technique
- 12.1.3. By Application
- 12.1.4. By End User
- 12.1.5. By Country
 - 12.1.5.1. China Anti Jamming Market Outlook
 - 12.1.5.1.1. Market Size & Forecast
 - 12.1.5.1.1.1. By Value
 - 12.1.5.1.2. Market Share & Forecast
 - 12.1.5.1.2.1. By Receiver Type
 - 12.1.5.1.2.2. By Anti Jamming Technique
 - 12.1.5.1.2.3. By Application
 - 12.1.5.1.2.4. By End User
 - 12.1.5.2. India Anti Jamming Market Outlook
 - 12.1.5.2.1. Market Size & Forecast
 - 12.1.5.2.1.1. By Value
 - 12.1.5.2.2. Market Share & Forecast
 - 12.1.5.2.2.1. By Receiver Type
 - 12.1.5.2.2.2. By Anti Jamming Technique
 - 12.1.5.2.2.3. By Application
 - 12.1.5.2.2.4. By End User
 - 12.1.5.3. Japan Anti Jamming Market Outlook
 - 12.1.5.3.1. Market Size & Forecast
 - 12.1.5.3.1.1. By Value
 - 12.1.5.3.2. Market Share & Forecast
 - 12.1.5.3.2.1. By Receiver Type
 - 12.1.5.3.2.2. By Anti Jamming Technique
 - 12.1.5.3.2.3. By Application
 - 12.1.5.3.2.4. By End User
 - 12.1.5.4. South Korea Anti Jamming Market Outlook
 - 12.1.5.4.1. Market Size & Forecast

- 12.1.5.4.1.1. By Value
- 12.1.5.4.2. Market Share & Forecast
 - 12.1.5.4.2.1. By Receiver Type
 - 12.1.5.4.2.2. By Anti Jamming Technique
 - 12.1.5.4.2.3. By Application
 - 12.1.5.4.2.4. By End User
- 12.1.5.5. Australia Anti Jamming Market Outlook
 - 12.1.5.5.1. Market Size & Forecast
 - 12.1.5.5.1.1. By Value
 - 12.1.5.5.2. Market Share & Forecast
 - 12.1.5.5.2.1. By Receiver Type
 - 12.1.5.5.2.2. By Anti Jamming Technique
 - 12.1.5.5.2.3. By Application
 - 12.1.5.5.2.4. By End User

13. MARKET DYNAMICS

- 13.1. Drivers
- 13.2. Challenges

14. MARKET TRENDS AND DEVELOPMENTS

15. COMPANY PROFILES

- 15.1. Raytheon Technologies Corporation
 - 15.1.1. Business Overview
 - 15.1.2. Key Revenue and Financials
 - 15.1.3. Recent Developments
 - 15.1.4. Key Personnel
 - 15.1.5. Key Product/Services Offered
- 15.2. BAE Systems plc
 - 15.2.1. Business Overview
 - 15.2.2. Key Revenue and Financials
 - 15.2.3. Recent Developments
 - 15.2.4. Key Personnel
 - 15.2.5. Key Product/Services Offered
- 15.3. Northrop Grumman Corporation
 - 15.3.1. Business Overview
 - 15.3.2. Key Revenue and Financials

- 15.3.3. Recent Developments
- 15.3.4. Key Personnel
- 15.3.5. Key Product/Services Offered
- 15.4. Thales Group
 - 15.4.1. Business Overview
 - 15.4.2. Key Revenue and Financials
 - 15.4.3. Recent Developments
 - 15.4.4. Key Personnel
 - 15.4.5. Key Product/Services Offered
- 15.5. The Boeing Company
 - 15.5.1. Business Overview
 - 15.5.2. Key Revenue and Financials
 - 15.5.3. Recent Developments
 - 15.5.4. Key Personnel
 - 15.5.5. Key Product/Services Offered
- 15.6. Lockheed Martin Corporation
 - 15.6.1. Business Overview
 - 15.6.2. Key Revenue and Financials
 - 15.6.3. Recent Developments
 - 15.6.4. Key Personnel
 - 15.6.5. Key Product/Services Offered
- 15.7. NovAtel Inc. (Acquired by Hexagon AB)
 - 15.7.1. Business Overview
 - 15.7.2. Key Revenue and Financials
 - 15.7.3. Recent Developments
 - 15.7.4. Key Personnel
 - 15.7.5. Key Product/Services Offered
- 15.8. L3Harris Technologies, Inc.
 - 15.8.1. Business Overview
 - 15.8.2. Key Revenue and Financials
 - 15.8.3. Recent Developments
 - 15.8.4. Key Personnel
 - 15.8.5. Key Product/Services Offered
- 15.9. Cobham plc (Now part of Advent International)
 - 15.9.1. Business Overview
 - 15.9.2. Key Revenue and Financials
 - 15.9.3. Recent Developments
 - 15.9.4. Key Personnel
 - 15.9.5. Key Product/Services Offered

15.10. Rockwell Collins, Inc

15.10.1. Business Overview

15.10.2. Key Revenue and Financials

15.10.3. Recent Developments

15.10.4. Key Personnel

15.10.5. Key Product/Services Offered

16. STRATEGIC RECOMMENDATIONS

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