

C4ISR Market-Global Industry Size, Share, Trends, Opportunity, and Forecast, 2018-2028 Segmented By Component (Hardware, Software), By Platform (Naval, Airborne, Land and Space), By End User (Defense & Space, Homeland Security, Civil Organizations, Others), By User Type (Government & Military, Commercial), By Region

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Abstracts

Global C4ISR market stood at USD111.40 billion in 2022 and is estimated to reach USD154.78 billion in 2028, advancing with a CAGR of 5.93% through 2028. Rising military expenditure on automobiles, increasing global territorial conflicts, and growing terrorism are driving the growth of the global C4ISR market in the forecast years.

C4ISR refers to technology that enables defense and strategic decision-makers to carry out command-and-control orders by providing actionable intelligence. A clearer grasp of an adversary's capabilities and enhanced Situational Awareness (SA) are now partly attributable to recent developments in systems, methodologies, and technologies. By reducing the amount of time between the initial perception of a threat and the decisions made to neutralize it, such improved SA will help to improve C4ISR capabilities.

Command, control, communications, computers, intelligence, surveillance, and reconnaissance, often known as C4ISR, is the military's 'nervous system,' a group of sub-systems utilized to maximize the use of real-time Situational Awareness (SA). Any defense operation's foundation is C4ISR, which ensures battlefield visibility. It gathers and analyzes information from numerous sources, compiles it, conducts analysis on it, and then transmits it to all concerned bodies for coordinated and fast action. The services and intelligence organizations are just two of the entities that provide data to

C4ISR. A crucial factor to take into account in this situation is the possibility that none of these stakeholders would desire to reveal their internal architecture, including data and apps. As a result, it is important to establish a collaborative network-centric design that enables all agencies to exchange the identified data when required or necessary while preserving the confidentiality of other data.

Rising Military and Defense Applications

Military and defense applications are a significant driver of the C4ISR market, as they require advanced situational awareness capabilities for intelligence gathering, threat detection, and missile defense. C4ISR systems provide a range of capabilities that enable military forces to collect, process, analyze, and disseminate information, improving their ability to conduct operations in complex and dynamic environments. The growing use of unmanned aerial vehicles (UAVs) and other unmanned systems in military and defense operations has also driven the demand for C4ISR systems. These systems require advanced communication and control capabilities to operate effectively, and C4ISR systems provide the necessary infrastructure to support these operations.

Technological Advancements

The emergence of cutting-edge technologies like artificial intelligence, machine learning, and big data analytics has made it possible to build more complex C4ISR systems that can manage massive volumes of data and offer real-time insights. Military organizations are now better able to make decisions based on the information gathered owing to AI-enabled C4ISR systems that can analyze and interpret data more rapidly and precisely. Cybersecurity has become more of a priority as a result of the rising usage of digital technology in C4ISR systems. C4ISR systems are now more protected from potential cyber assaults owing to developments in cybersecurity technology, including intrusion detection and encryption.

Surging Contractual Tie-ups

The necessity of C4ISR systems is substantial in countries that are engaged in defense activities, particularly countries like the United States and Russia. The ERP solutions are putting into strategic operation efforts, including partnerships and collaborations, as well as improved research capabilities to address this growing demand. The US Department of Defense has raised its need for intelligence, surveillance, and reconnaissance (ISR) tools, such as unmanned aircraft and ground vehicle systems, since they are necessary for military operations. Thus, in May 2020, the Joint Artificial

Intelligence Center of the Department of Defense and Booz Allen Hamilton engaged in a five-year deal for the provision of artificial intelligence services.

Increasing Usage of Unmanned Systems

Unmanned systems, such as drones and unmanned ground vehicles, are increasingly integrated into C4ISR systems. These systems provide enhanced situational awareness, intelligence gathering, and reconnaissance capabilities without putting human operators at risk. Unmanned systems of all kinds, such as unmanned aerial vehicles (UAVs), unmanned ground vehicles (UGVs), unmanned surface vessels (USVs), and unmanned underwater vehicles (UUVs), are used as C4I and C4ISR assets to provide intelligence for areas of the battlefield on land, at sea, and in the air. ISR system costs have significantly decreased over the years due to improvements in ISR technologies and manufacturing methods. It is one of the major drivers for the global C4ISR market, with the continuous improvement in the defense and surveillance capabilities of the armed forces and law enforcement.

Market Segmentation

The Global C4ISR Market is divided into components, platform, end user, user type, regions, and competitive landscape. Based on components, the market is divided into hardware and software. Based on platform, the market is segmented into naval, airborne, land & space. Based on the end user, it is segmented into defense & space, homeland security, civil organizations, and others. Based on user type, the market is segmented into government & military and commercial.

Market Players

Major market players in the Global C4ISR Market are Lockheed Martin Corporation, Raytheon Technologies Corporation, Northrop Grumman Corporation, The Boeing Company, BAE Systems Plc, Kratos Defense & Security Solutions Inc, L3Harris Technologies Inc., Thales Group, Elbit Systems Ltd., General Dynamics Corporation. In the interest of gaining more market share and securing new contracts with the armed forces, the corporations are involved developing strategies. To increase their presence in new markets, market participants are proactively developing joint ventures and partnerships with regional producers. In addition to these goals, it is projected that expenditures in R&D would help the businesses in the coming years lure in more clients and grow their market share as they build C4ISR systems that are integrated with AI and quantum networking.

Recent Developments:

The Indian Defense Ministry and BEL entered into a partnership in March 2022 to provide the Indian Air Force's fighter jets with an advanced electronic warfare suite. The Ministry of Defense and Bharat Electronics Limited (BEL) inked a contract worth around USD 255 million.

In order to improve working relationships with different national agencies in charge of maritime security, the Qatari Emiri Naval Forces (QENF) chose Leonardo in March 2022 to build a Naval Operation Centre (NOC). The NOC will provide command, control, and coordination of operations at territorial water, the Exclusive Economic Zone (EEZ), and adjacent waters simultaneously.

Leidos received a contract modification from the US Naval Sea Systems Command in March 2022 to deploy the AN/SQQ-89A(V)15 undersea fighting system on the Navy's battle boats. The contract had a USD81.1 million value. The surface vessels will be equipped with the AN/search, SQQ-89A(V)15's detection, classification, localization, and tracking capabilities (like submarines, sea mines, torpedoes, etc.)

Report Scope:

In this report, the Global C4ISR Market has been segmented into the following categories, in addition to the industry trends, which have also been detailed below:

C4ISR Market, By Component:

Hardware

Software

C4ISR Market, By Platform:

Naval

Airborne

Land

Space

C4ISR Market, By End User:

Defense & Space

Homeland Security

Civil Organizations

Others

C4ISR Market, By User Type:

Government & Military

Commercial

C4ISR Market, By Region:

North America

United States

Canada

Mexico

Asia-Pacific

China

India

Japan

South Korea

Australia

Indonesia

Thailand

Europe & CIS

Russia

United Kingdom

France

Germany

Italy

Spain

Poland

Middle East & Africa

Saudi Arabia

Israel

United Arab Emirates

Turkey

South Africa

South America

Brazil

Argentina

Competitive Landscape

Company Profiles: Detailed analysis of the major companies present in the Global C4ISR Market.

Available Customizations:

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).

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