

Surveillance Radars Market – Global Industry Size, Share, Trends, Opportunity, and Forecast, Segmented By Platform (Land, Airborne, Naval, Space, Others), By Application (Commercial, National Security, Defense & Space, Others), By Region, By Competition, 2020-2030F

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Abstracts

The Global Surveillance Radars Market was valued at USD 9.78 billion in 2024 and is expected to reach USD 16.67 billion by 2030 with a CAGR of 9.35% during the forecast period. The global surveillance radars market is experiencing significant growth due to rising security concerns, advancements in radar technology, and expanding defense applications. Surveillance radars are widely used in military, aviation, maritime, and border security for detecting and tracking objects, enhancing situational awareness. Technological innovations like phased-array radar, solid-state radars, and multi-functional radar systems are driving market growth. The increasing demand for national security and defense systems, particularly in regions with geopolitical tensions, is a key factor in the market's expansion. Additionally, radar systems for air traffic control and homeland security applications contribute to the market's broader adoption across industries.

Market Drivers

Increasing Security Concerns and Geopolitical Tensions

One of the primary drivers of the global surveillance radars market is the growing concern over security threats across various regions. Geopolitical tensions, the rise in terrorism, and border security challenges are fueling the demand for advanced

surveillance systems. Countries are heavily investing in enhancing their defense infrastructure to safeguard against both internal and external threats. Surveillance radars play a crucial role in monitoring air, sea, and land borders, detecting potential intrusions, and providing early warnings. These radars enable the identification and tracking of hostile forces, aircraft, or vessels, ensuring the protection of national security. For instance, In Dec 2024, India is nearing a USD 4 billion agreement with Russia for an advanced long-range radar system, enhancing missile detection and air defense. Supporting the 'Make in India' initiative, 60% of components will be locally produced, strengthening domestic manufacturing and bilateral defense relations. With an impressive 8,000-km range, the radar will be stationed in Karnataka, bolstering regional security and early warning infrastructure. This deal underscores India's commitment to modernizing its defense capabilities amidst evolving geopolitical challenges, fueling growth in the surveillance radar market.

Technological Advancements in Radar Systems

Technological advancements in radar technology are another significant driver for the global surveillance radars market. The continuous innovation in radar systems, such as the development of phased-array radar, solid-state radar, and multi-function radar systems, has improved radar performance and expanded their applications. These advanced radars offer higher accuracy, longer range, and better resolution, making them more effective in complex environments.

Phased-array radars, for example, allow rapid scanning of a wide area without moving mechanical parts, providing faster detection and tracking capabilities. Solid-state radars offer enhanced reliability and durability compared to traditional radar systems, while multifunction radars enable simultaneous tracking of multiple targets. These advancements allow surveillance radars to perform more complex functions and operate in various weather conditions, boosting their adoption across defense, aviation, maritime, and homeland security sectors.

Expansion of Military and Defense Budgets

The expansion of military and defense budgets worldwide is a key factor contributing to the growth of the surveillance radars market. Countries are increasing their defense spending to address growing security challenges and to modernize their military capabilities. Radar systems, being a critical component of defense infrastructure, are seeing increased procurement as part of this modernization. For instance, in 2023, the United States accounted for approximately 40% of global military expenditures,

significantly driving defense-related markets. This substantial investment fosters the development and deployment of advanced technologies, bolstering the surveillance radars market.

Nations are focusing on upgrading their air defense systems, naval vessels, and border security infrastructure, all of which require high-performance radar systems. For example, radars are essential for tracking enemy aircraft, missiles, and other threats, ensuring that defense forces can respond quickly and effectively. Additionally, the growing interest in unmanned aerial vehicles (UAVs), which require radar systems for detection and interception, is further boosting market demand. As nations continue to prioritize national defense and invest in next-generation military technologies, the surveillance radars market is expected to witness sustained growth.

Key Market Challenges

Complexity of Integration and Compatibility Issues

Another challenge in the global surveillance radars market is the complexity of integrating advanced radar systems into existing infrastructure and technologies. Surveillance radars need to be integrated with other security systems, including command and control platforms, communication networks, and data analytics systems. Ensuring that these systems work seamlessly together requires overcoming compatibility issues, which can be technologically challenging and time-consuming.

Older radar systems or legacy technologies may not easily integrate with newer radar systems, requiring significant modifications to both hardware and software. This can result in lengthy installation times, increased costs, and potential disruptions to ongoing operations. Furthermore, the integration of radar systems with advanced technologies like artificial intelligence (AI), machine learning (ML), and unmanned aerial vehicles (UAVs) demands highly specialized expertise, which may be in short supply.

Regulatory and Spectrum Management Challenges

Regulatory and spectrum management issues present significant challenges to the global surveillance radars market. Radar systems operate in specific frequency bands, which are regulated by government agencies to ensure that different communication technologies do not interfere with each other. In many countries, the allocation of radio frequency spectrum is a highly competitive and regulated process, with various industries vying for access to bandwidth for their respective technologies.

For surveillance radars, securing the necessary spectrum licenses and approvals can be a lengthy and complex process. In some regions, the available spectrum for radar systems is limited, which can create competition with other technologies like mobile communications, satellite services, and broadcasting. This competition can lead to delays in deploying radar systems, as governments may need to negotiate and coordinate with other industries to allocate sufficient bandwidth.

Key Market Trends

Adoption of Phased-Array Radar Technology

One of the key trends shaping the global surveillance radars market is the growing adoption of phased-array radar technology. Phased-array radars offer significant advantages over traditional radar systems, particularly in terms of speed, accuracy, and flexibility. Unlike conventional radar systems that rely on mechanical rotation to scan an area, phased-array radars use electronically controlled beams to scan a wide area in multiple directions without moving parts. This capability allows for faster detection and tracking of multiple targets simultaneously, making it particularly valuable for military, air traffic control, and defense applications.

The ability to detect and track objects at long distances, even in adverse weather conditions, is a key advantage of phased-array radar. The technology also allows for dynamic adjustments in scanning patterns and frequencies, which enhances the radar's ability to identify and target a wide range of objects, from aircraft to missiles. As the demand for more sophisticated and versatile surveillance systems continues to rise, the adoption of phased-array radar is expected to grow significantly. This trend is not only driven by military and defense needs but also by the increasing demand for radar systems in the aviation, maritime, and homeland security sectors.

Miniaturization and Development of Compact Radar Systems

Another significant trend in the global surveillance radars market is the miniaturization and development of compact radar systems. As surveillance radars become more essential across various industries, there is increasing demand for smaller, more portable radar systems that can be easily integrated into different platforms, including unmanned aerial vehicles (UAVs), drones, and mobile units.

Miniaturization of radar systems is driven by the need for flexibility and mobility,

particularly in military and defense applications. Compact radar systems can be deployed quickly in a variety of environments, including urban areas, remote locations, and in battlefield scenarios. These smaller radar systems are not only more cost-effective but also offer the benefit of easier deployment and operation. For example, drones equipped with compact surveillance radars are becoming increasingly popular for surveillance and reconnaissance missions, providing real-time intelligence and situational awareness in challenging environments.

Rise in Demand for Radar Systems in Homeland Security and Civilian Applications

In addition to military and defense applications, there is a notable trend of rising demand for surveillance radar systems in homeland security and civilian sectors. Governments around the world are increasingly investing in advanced radar systems to enhance public safety, border security, and disaster response capabilities. Surveillance radars are being deployed to monitor borders, detect unauthorized border crossings, and provide early warning in case of natural disasters or terrorist threats.

The use of radar systems for border security is particularly crucial in regions with high immigration rates or political instability. Radar systems enable border patrol agencies to detect intrusions, monitor traffic, and protect critical infrastructure. Furthermore, with the rise in global threats related to terrorism, radar systems are being used to monitor critical national infrastructure, airports, and large public events.

Segmental Insights

Application Insights

The commercial segment is the dominant force in the global surveillance radars market, driven by increasing demand across aviation, maritime, and transportation sectors. In aviation, radar systems are critical for air traffic control, ensuring safe and efficient flight management. In maritime applications, radar is essential for vessel navigation, collision avoidance, and monitoring. Additionally, autonomous vehicles leverage radar technology for obstacle detection and safe navigation. The growing emphasis on public safety, border security, and disaster management further fuels the demand for surveillance radars in commercial applications. The commercial sector's rapid adoption of advanced radar technologies continues to drive market growth globally.

Regional Insights

North America dominates the global surveillance radars market due to strong demand from military, defense, and commercial sectors. The U.S. is a major contributor, investing heavily in advanced radar technologies for national security, air traffic control, and homeland defense. The region's well-established defense infrastructure and ongoing technological advancements in radar systems, such as phased-array radars and AI integration, further bolster its market share. Additionally, North America is home to leading radar manufacturers and research institutions, enabling continuous innovation. The increasing need for surveillance in defense, aerospace, and border security continues to drive growth in the region's radar market.

Key Market Players

RTX Corporation

Lockheed Martin Corporation

Hensoldt AG

Israel Aerospace Industries Ltd.

Leonardo S.p.A.

L3Harris Technologies, Inc.

Northrop Grumman Corporation

Thales Group

Honeywell International Inc.

Saab AB

Report Scope:

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

Surveillance Radars Market, By Platform:

Land

Airborne

Naval

Space

Others

Surveillance Radars Market, By Application:

Commercial

National Security

Defense & Space

Others

Surveillance Radars 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 Surveillance Radars Market.

Available Customizations:

Global Surveillance Radars 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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