

Air Defense Radar Market Forecast to 2030 - Global Analysis by range (long range, medium range, and short range), product type (synthetic aperture and moving target indicator radar, surveillance radar, airborne early warning radar, multi-functional radar, weather radar, and others), system type (fixed and portable), platform (ground-based, aircraft-mounted, and naval-based), application (ballistic missile defense, identification friend or foe, weather forecasting, and others), and geography

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Abstracts

The air defense radar market is projected to reach US\$ 9.36 billion by 2030, growing at a CAGR of 4.7% from 2022 to 2030.

The air defense radar market growth is driven by the increasing investments by governments across the globe. Countries such as the US, Canada, Germany, Morocco, and Hungary are modernizing their fighter aircraft with new powerful radar. In 2021, a component of the Boeing CF-18 vintage hornet was upgraded with new electronically scanned array (AESA) radar systems across Canada. Similarly, Raytheon Technologies Corporation provided 36 of its AN/APG-79(V)4 radar systems prior to their integration into Royal Canadian Air Force (RCAF) CF-18s. Similarly other developments have also been contributing to the air defense radar market. For instance, in January 2022, the Hungarian government and SAAB AB announced an agreement on incorporating the SAAB PS-05/A Mk 4 radar into 14 aircraft by the Hungarian Air Force, including two D-model trainers. This addition is expected to significantly improve aircraft performance

and tracking range, as well as improve the detection of small air-to-air targets.

Manufacturers develop different types of products, ranges, and systems and provide innovative solutions to meet the requirements of end users. Quality control measures are implemented throughout manufacturing to ensure the final product meets the required standards. This includes inspecting the raw materials, verifying the accuracy of dimensions, and studying attack detection and sensory characteristics of the air defense radar systems. It also enables early detection, tracking, and interception of aerial threats such as missiles, aircraft, and drones. Air defense radar market players are also playing a crucial role in the air defense radar market. A few of the air defense radar market players operating the air defense radar market include BAE Systems, General Dynamics Corporation, Honeywell International Inc., Israel Aerospace Industries Inc., Leonardo S.p.A, Lockheed Martin Corporation, Northrop Grumman Corporation, Raytheon Technologies Corporation, SAAB AB, and Thales Group. Such factors are contributing to catalyze the air defense radar market size or the air defense radar market growth.

Unmanned aerial vehicles (UAVs) pose new challenges to air defense systems due to their small size, low radar cross-section, and ability to fly at low altitudes. The increasing use of UAS for various purposes, including surveillance, weapon delivery, and disruption, poses a global threat. Air defense radar systems play a crucial role in detecting and tracking UAVs, providing early warning and situational awareness. The increasing adoption of UAVs necessitates the deployment of advanced radar systems with improved detection capabilities to effectively counter these threats. Counter-UAV systems often consist of a combination of sensors, including radar, electro-optical/infrared (EO/IR) sensors, and electronic warfare capabilities. Air defense radar systems serve as a critical component within these integrated counter-UAV systems, providing essential detection and tracking capabilities. As the threat from UAS becomes more evident, governments and defense organizations worldwide are prioritizing the development and acquisition of air defense systems to counter this evolving threat. In April 2023, the US Army signed a contract worth US\$ 237 million with Raytheon Technologies for the supply of Ku-band Radio Frequency Sensors and Coyote effectors to detect and defeat unmanned aircraft. The KuRFS radar systems provide enhanced detection capabilities specifically designed to detect UAS threats.

Europe witnesses the rising procurement of various defense systems. According to the WDMMA and Global FPI, Europe currently holds 627 fleets, including frigates, corvettes, destroyers, aircraft carriers, and submarines. Apart from these, in 2023, the region secured 134 fleets for future procurement. Thus, the growing procurement of

these fleets is expected to drive the air defense radar systems during the forecast period. Moreover, the presence of key air defense radar market players such as Leonardo S.p.A, Thales Group, Rheinmetall, and HENSOLDT is driving the growth of the air defense radar market.

Synthetic aperture radar (SAR) is focused on high-resolution imaging of stationary targets, while moving target indicator (MTI) radar specializes in detecting and tracking moving targets while suppressing stationary clutter. SAR is not significantly affected by weather conditions such as fog, clouds, or darkness. Unlike optical sensors that rely on visible light, SAR uses microwave frequencies that can penetrate through clouds, smoke, and other atmospheric obstructions. This ability to function in all-weather capabilities makes SAR suitable for continuous monitoring and imaging. Various key air defense radar market players are enhancing their offerings with the integration of SAR and MTI radar systems.

Multi-functional radar systems offer enhanced operational efficiency by integrating multiple radar capabilities into a single platform. By combining functionalities such as surveillance, tracking, target acquisition, and fire control, these radars streamline operations, reduce hardware complexity, and optimize resource utilization. The ability to perform multiple tasks with a single system increases operational efficiency and effectiveness. Further, cost efficiency, space optimization, operational efficiency, enhanced situational awareness, flexibility, integration with sensor networks, and the need to address evolving threats drive the demand for multi-functional radar systems across various sectors, including defense, security, aerospace, and maritime applications. For instance, in October 2022, Hensoldt, a German sensor solutions specialist, delivered the first TRML-4D radar system to equip Diehl Defence's IRIS-T SLM air defense system. The IRIS-T SLM is a surface-launched medium-range air defense system designed to protect against aerial threats. The inclusion of the TRML-4D radar enhances the system's detection and tracking capabilities, improving its effectiveness in identifying and engaging targets. This improvement helps in increasing the air defense radar market growth

Based on product type, the air defense radar market is segmented into synthetic aperture radar and moving target radar, surveillance radar, airborne early warning radar, multi-functional radar, weather radar, and others. The combination of SAR's high-resolution imaging of stationary targets and MTI's tracking of moving targets offers comprehensive surveillance and intelligence capabilities, making them valuable in military and security operations. Surveillance radar systems provide critical situational awareness, enhance airspace and maritime security, and support activities such as

coastal surveillance, border protection, and marine domain awareness. These segments help in boosting the growth of the air defense radar market.

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