

Europe Synthetic Aperture Radar Market Forecast to 2030 - Regional Analysis - by Component (Receiver, Transmitter, and Antenna), Frequency Band (X Band, L Band, C Band, S Band, and Others), Application (Commercial and Defense), Platform (Ground and Airborne), and Mode (Single and Multi)

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Abstracts

The Europe synthetic aperture radar market was valued at US\$ 1,498.08 million in 2022 and is expected to reach US\$ 3,649.12 million by 2030; it is estimated to register a CAGR of 11.8% from 2022 to 2030.

Rising Preference for Integrated C4ISR Ecosystem Drives Europe Synthetic Aperture Radar Market

The synthetic aperture radar market is driven by the increasing preference for an integrated Command, Control, Communications, Computers, Intelligence, Surveillance, and Reconnaissance (C4ISR) ecosystem. Traditionally, C4ISR systems have relied on separate stand-alone units, each equipped for specific functions and mission requirements. This approach often leads to the use of separate systems and displays for collecting and analyzing information, resulting in a rigorous and time-consuming process. To address these challenges, defense agencies are now leaning toward adopting an enterprise integration approach. This approach advocates for the integration of secure and interoperable C4ISR networks and systems, streamlining the entire process. In this integrated C4ISR approach, governments take responsibility for designing enterprise blueprints and intersystem interfaces. At the same time, vendors deliver individual systems and sub-components that can be seamlessly integrated into the overall C4ISR environment.

The adoption of an integrated C4ISR approach offers several benefits. Firstly, it simplifies the process for Original Equipment Manufacturers (OEMs) and prime integrators, as they do not have to upgrade existing systems. This results in cost advantages and process simplifications for these stakeholders. Secondly, the integration of C4ISR networks and systems enhances operational efficiency by enabling parallel planning and decision-making abilities, enhancing situational awareness, and staying ahead of adversaries in accelerated operational environments. This trend represents a paradigm shift from the traditional acquisition approach and is expected to have a positive impact on the synthetic aperture radar market. The integration of C4ISR systems improves the overall efficiency and effectiveness of military operations and contributes to cost savings and process simplifications. As a result, the demand for SAR systems, which play a crucial role in the integrated C4ISR ecosystem, grows, thereby positively favoring the market.

Europe Synthetic Aperture Radar Market Overview

The Europe synthetic aperture radar market is segmented into Germany, France, Italy, the UK, Russia, and the Rest of Europe. The Maritime Defense, Security, and Surveillance sectors in Europe are gaining significance and expanding with technological innovations and applications for military and civil use. France and the UK account for 40% of the total Defense R&D spending in Europe, followed by Germany, Italy, Spain, and Sweden. Thus, various players are advancing SAR with AI and cutting-edge software. For instance, in August 2023, Polish company Satim secured US\$ 2.2 million in their latest investor round. The firm plans to use these funds to advance its AI-based, cutting-edge software for automatic object detection, identification, and classification capabilities anytime, anywhere, using satellite synthetic aperture radar imagery.

Several players across the region are adding synthetic aperture radar to unmanned aerial vehicles. For example, in April 2023, the European market leader in unmanned aerial systems (UAV) and intelligence-as-a-service solutions, TEKEVER, announced that it has effectively added GAMASAR to its AR5 UAS. GAMASAR is a synthetic aperture radar designed and developed by TEKEVER to support aerial and space-based Earth observation. It is now available on both AR5 and AR3 systems to support the most demanding land and maritime missions. The integration of synthetic aperture radar payloads typically imposes a significant tradeoff in operational capabilities, especially in smaller UAS platforms.

European countries are using remote sensing for the detection of vehicle emissions, earth observation, and several other reasons. Various players across Europe are taking strategic initiatives, such as partnerships, to provide remote sensing applications. For example, Umbra announced a strategic partnership with European Space Imaging (EUSI). With this partnership agreement, EUSI will gain the ability to oversee global tasking and delivery of SAR imagery for its customers using Umbra's advanced satellite constellation and tasking platform. This collaboration will offer a significant benefit to remote sensing data users across Europe, as they can now acquire the world's highest resolution space-based optical and synthetic aperture radar imagery 30 cm and 25cm resolutions, respectively. Such integration of a synthetic aperture radar with UAS and advancement in synthetic aperture radar propels the growth of the synthetic aperture radar market.

Europe Synthetic Aperture Radar Market Revenue and Forecast to 2030 (US\$ Million)

Europe Synthetic Aperture Radar Market Segmentation

The Europe synthetic aperture radar market is categorized into component, frequency band, application, platform, mode, and country.

Based on component, the Europe synthetic aperture radar market is categorized into receiver, transmitter, and antenna. The antenna segment held the largest market share in 2022.

In terms of frequency band, the Europe synthetic aperture radar market is categorized into x band, l band, c band, s band, and others. The x band segment held the largest market share in 2022.

By application, the Europe synthetic aperture radar market is segmented into commercial and defense. The defense segment held a larger market share in 2022.

Based on platform, the Europe synthetic aperture radar market is bifurcated into ground and airborne. The airborne segment held a larger market share in 2022.

In terms of mode, the Europe synthetic aperture radar market is bifurcated into single and multi. The multi segment held a larger market share in 2022.

By country, the Europe synthetic aperture radar market is segmented into Germany, the UK, France, Italy, Russia, and the Rest of Europe. The UK dominated the Europe

synthetic aperture radar market share in 2022.

Northrop Grumman Corp, ASELSAN AS, BAE Systems Plc, Israel Aerospace Industries Ltd, Leonardo SpA, Lockheed Martin Corp, Raytheon Technologies Corp, Thales SA, and Saab AB are some of the leading companies operating in the Europe synthetic aperture radar market.

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