

# **Military Optronics Surveillance and Sighting Systems Market Size and Forecast (2021 - 2031), Global and Regional Share, Trend, and Growth Opportunity Analysis Report Coverage: By Type (Image Intensification, Military Laser Systems, and Electro-Optics or Infrared), Component (Night Vision Devices, Handheld Thermal Imaging Devices, Integrated Observation Equipment, Standalone Infrared, Seismic and Acoustic Sensors, and Others), End Users (Ground, Airborne, and Naval), and Geography**

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## **Abstracts**

The Military Optronics Surveillance and Sighting Systems market size was valued at US\$ 17.35 billion in 2023 and is expected to reach US\$ 26.85 billion by 2031; it is estimated to record a CAGR of 5.6% from 2023 to 2031.

The Military Optronics Surveillance and Sighting Systems market is segmented into five major regions—North America, Europe, Asia Pacific (APAC), the Middle East & Africa (MEA), and South America. Asia Pacific dominated the market in 2023, followed by Europe and North America, respectively.

Increasing military spending across the globe is driving the military optronics surveillance and sighting systems market growth. In 2023, military spending accounted for 2.3% of the global gross domestic product (GDP). The five largest military spenders in 2023 were the US, Russia, China, India, and Saudi Arabia, which together accounted for around 61% of the world's military spending. The world's military expenditure

reached US\$ 2,443 billion in 2023, an increase of 6.8% compared to 2022. The US and China remained the largest two military spenders across the globe. In 2023, the US spending was valued at US\$ 916 billion, while Chinese military spending was valued at US\$ 296 billion.

North America held the largest share of the global military optronics surveillance and sighting systems market, followed by Asia Pacific (APAC), Europe, the Middle East & Africa (MEA), and South America (SAM). North American countries experience significant demand from the US army owing to increasing military spending. Several major players in the North American region are investing significant amounts in the procurement of military optronics surveillance and sighting systems. In November 2023, Elbit Systems Ltd. announced a contract worth US\$ 500 million from the US Department of Defense (DOD). Elbit Systems' US-based subsidiary, Night Vision LLC (Elbit Systems of America) was awarded a contract to supply Squad Binocular Night Vision Goggle (SBNVG) systems to the US Department of Defense. Such increasing investments by the US Department of Defense to procure military optronics surveillance and sighting systems drive the market growth.

Among all these regions, Asia Pacific was estimated to be the fastest-growing region across the global military optronics surveillance & sighting systems market. Lockheed Martin Corporation, Thales Group, Raytheon Technologies Corporation, Rafael Advanced Defense Systems Ltd., and HENSOLDT are among the key players operating in the military optronics surveillance and sighting systems market. Enhancing military modernization initiatives worldwide and integration of next-generation technologies such as artificial intelligence in defense systems further drive the market growth of military optronics surveillance and sighting systems. Owing to distinct rules, regulations, norms, and policies of different countries, trade barriers in this market may act as restraining factors to an extent. Many nations in Asia Pacific are still developing, e.g., Pakistan, Bangladesh, Bhutan, India, Nepal, Myanmar, and Mongolia. With growing awareness of high-end surveillance systems for the security of the country, these nations are expanding their existing technological capabilities. Growing military spending as a part of GDP is also increasing considerably in almost all developing nations across the world. Owing to the growing threat of terrorist attacks in Asia, the demand for surveillance optronics systems, sights, scopes, night-vision attachments, target sight systems (TSS), laser rangefinders, monitoring systems, and security cameras is expected to grow notably. Countries such as India are enhancing their local weapon manufacturing capacities with contracts awarded to firms and organizations.

Based on offering, the global military optronics surveillance and sighting systems

market is bifurcated into image intensification, military laser systems, electro-optics/infrared. The electro-optics or infrared segment dominated the market for offering in 2023. Electro-optics/Infrared is another technology receiving high prominence in different corners of the world. The electro-optical/infra-red systems are imaging systems utilized among law enforcement & military Platforms consists of both infrared & visible sensors. The electro-optics/infrared systems give total situational awareness at night & day as well as in low light conditions. In the era of continuous developments, systems used in military Platforms are also getting developed. For instance, in February 2021, Lockheed Martin Corp. are constructing 19 multi-sensor electro-optical and infrared fire-control systems for AH-1Z Viper attack helicopters which operate for the Czech Republic and Bahrain.

Military laser system held the second largest market share in 2023. The lasers have a potential to magnify the spectrum of military effect. The laser weapons are precision weapons whose effect is limited to a tiny spot. For instance, at low power, they can astonish optronics, which enable the users to restrict them from further view. At higher power levels, the lasers weapons can cut the structures like for destroying munitions/neutralize unmanned aerial systems. Moreover, few initiatives has been witnessed in the laser systems for military which is expected to promote the market growth. For instance, in November 2021, the military is commissioning their most powerful laser weapon to date. The US Army asked for 300 KW solid state laser and has granted a contract to General Atomics for supplying the same. The 300 KW solid state laser is powerful enough to destroy different objects, from small drones to flying missiles. General Atomics is subjected to construct laser, and Boeing, a defense giant will incorporate targeting & tracking tools and software that enable the laser to find & hold focus on moving target.

Airbus, Lockheed Martin Corporation, Thales Group, General Dynamics Corporation, L3Harris Technologies Inc., Israel Aerospace Industries, Leidos inc., Rafael Advanced Defense Systems Ltd., Raytheon Company, Safran S.A. are among the key Military Optronics Surveillance and Sighting Systems market players that are profiled in this market study.

The overall military optronics surveillance and sighting systems market size has been derived using both primary and secondary sources. Exhaustive secondary research has been conducted using internal and external sources to obtain qualitative and quantitative information related to the military optronics surveillance and sighting systems market size. The process also helps obtain an overview and forecast of the market with respect to all the market segments. Also, multiple primary interviews have

been conducted with industry participants to validate the data and gain analytical insights. This process includes industry experts such as VPs, business development managers, market intelligence managers, and national sales managers, along with external consultants such as valuation experts, research analysts, and key opinion leaders, specializing in the military optronics surveillance and sighting systems market.

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## **14. APPENDIX**

- 14.1 About The Insight Partners

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