

# **The Airborne ISR Market 2012-2022: Intelligence, Surveillance and Reconnaissance Platforms & Technologies for Information Superiority**

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## **Abstracts**

Superior airborne intelligence, surveillance and reconnaissance (ISR) has been, and will continue to be, critical to the success of military forces. Indeed, despite defence spending cuts, ISR systems procurement is projected to continue over the long term. Both manned platforms and unmanned systems have proven to be important in various situations and the two types could see even greater partnership in the future.

Visiongain has determined that the value of the global airborne ISR market in 2012 will reach \$18.15bn.

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Global Airborne ISR market forecasts between 2012-2022

4 Airborne ISR submarket forecasts from 2012-2022

Airborne Early Warning (AEW)

Airborne Ground Surveillance (AGS)

Maritime Patrol (MP)

Signals Intelligence (SIGINT)

4 Other Airborne ISR Segment forecasts from 2012-2022

New Systems

Upgraded Systems

Manned

Unmanned

20 leading national Airborne ISR market forecasts between 2012-2022

US

Canada

UK

France

Germany

Italy

Spain

Turkey

Brazil

Russia

India

China

Japan

South Korea

Singapore

Pakistan

Australia

Saudi Arabia

United Arab Emirates

Israel

Rest of the World (RoW)

A SWOT analysis

30 leading companies identified and profiled

AAI Corporation

Aeronautics Defense Systems

AeroVironment Inc

BAE Systems

Boeing Defense, Space & Security

Cassidian (EADS)

Controp Precision Technologies

Elbit Systems Ltd

Elta Systems

Embraer

FLIR Systems

General Atomics Aeronautical Systems Inc

General Dynamics Corporation

Goodrich Corporation

Hawker Beechcraft Corporation

Honeywell

Insitu, Inc

Israel Aerospace Industries (IAI)

Kawasaki Heavy Industries

L-3 Communications

Lockheed Martin Corporation

Northrop Grumman Corporation

QinetiQ

Raytheon Company

Saab

Sagem Défense Sécurité

Schiebel

Selex Galileo

Telephonics

Thales Group

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## **COMPANIES LISTED**

AAI Corporation  
Adcom Systems  
Aerlyper  
Aeroelectronica (AEL)

Aeronautics Defence Systems

Aerosonde

AeroVironment

Agusta-Bell

AgustaWestland

Air France Industries

Airbus Military

AirRobot

Alenia Aermacchi

Alenia Aeronautica

Alenia SIA

Alpi

AMD

ASN Technology

Aurora Flight Sciences

Avibras

AVX Aircraft

BAE Systems

BAE Systems Australia

Baykar Makina

Bell Helicopter

Bell-Boeing

Beriev Aircraft Company

Boeing

Boeing Australia Ltd

Boeing Defense, Space & Security (BDS)

Bombardier

CAE

Cassidian

Cassidian Air Systems

Chengdu Aircraft Industry Corporation (CAC)

China Aerospace and Science Corporation (COSIC)

China Aerospace Science and Industry Corp. (CASIC)

China Aviation Industry Corp. (AVIC)

China Electronics Group Corporation

China National Aero-Technology Import and Export Corporation (CATIC)

Controp Precision Technologies

CybAero AB

Dassault Aviation

DCNS  
Denel Dynamics  
EADS  
EADS Astrium  
EADS CASA  
EADS Military Air Systems (MAS)  
EADS North America  
Elbit Systems Ltd  
Elta Systems  
Embraer  
EMT  
Ericsson Microwave Systems  
Eurocopter  
EuroHawk GmbH  
Finmeccanica  
FLIR Government Systems  
FLIR Systems Inc.  
Galileo Avionica  
General Atomics Aeronautical Systems Inc (GA-ASI)  
General Dynamics Canada  
General Dynamics Corporation  
General Motors  
Geneva Aerospace  
Goodrich Corporation  
Goodrich Corporation Surveillance and Reconnaissance Systems (SRS)  
Griffon Corporation  
Guizhou Aviation Industry Group  
Gulfstream  
Hawker Beechcraft Corporation  
Honeywell  
Honeywell Defense and Space Electronic Systems  
Hybrid Air Vehicles Ltd  
ILC Dover  
Ilyushin  
Indra  
ING Engineering  
Insitu  
Intel  
International Golden Group

Ishikawajima-Harima Heavy Industries  
Israel Aerospace Industries (IAI) Ltd  
Israel Aerospace Industries (IAI) MALAT Division  
Israel Aerospace Industries (IAI) Tamam Division  
Kaman  
Kawasaki Heavy Industries  
King Abdullah Design and Development Bureau (KADDB)  
Kongsberg  
Korean Aerospace Industries (KAI)  
Korean Air  
Korean Air Aerospace Division (ASD)  
L-3 Communications  
L-3 Communications Integrated Systems (L-3 IS)  
L-3 Communications MAS Canada  
L-3 Communications Systems-West  
L-3 Communications Wescam  
Lockheed Martin Corporation  
Lockheed Martin Skunk Works  
Lockheed Martin Systems Integration  
MacDonald, Dettwiler and Associates (MDA)  
MD Helicopters  
MotionDSP  
Nanjing Research Institute of Electronic Technology (NRIET)  
NH Indust4ries  
Nippon Airplane Manufacturing  
Northrop Grumman Aerospace Systems  
Northrop Grumman Corporation  
Northrop Grumman Electronics Sensors and Systems  
NPO Vega  
NVIDIA  
Pratt & Whitney  
Prioria Products  
Provincial Aerospace  
QinetiQ North America  
QinetiQ Plc  
Raytheon Company  
Raytheon Integrated Defense Systems  
Raytheon Intelligence, Surveillance and Reconnaissance Systems  
Raytheon Systems Ltd

Rheinmetall  
Rheinmetall Defence  
Rigel International Engineering & Consultancy Agency  
Rolls-Royce  
Rotax  
Ruag Aerospace Services  
Russian Helicopters  
Saab  
Safran Group  
Sagem  
Sagem Avionics  
Sagem Defense Securite (DS)  
Sagem Optronics and Defence  
Santos Lab  
Schiebel Corporation  
Schweizer  
Science Applications International Corporation (SAIC)  
Selex Communications  
Selex Galileo  
Selex Sensors and Airborne Systems (Selex S&AS)  
Shaanxi Aircraft Industry Corporation  
Shenyang Aircraft Corporation  
Sierra Nevada Corporation  
Sikorsky Aircraft Corporation  
Singapore Technologies Aerospace  
Sparta, Inc  
Spirit Aerosystems  
Synergy Group  
TCOM  
Telephonics  
Textron Inc  
Thales Canada  
Thales Group  
Thales UK  
Thielert  
Turkish Aerospace Industries (TAI)  
UAS Dynamics LLC  
U-TacS  
Uzbekistan's Tashkent Aircraft Production Organisation (TAPO)

Warwick Mills  
XPert Engineering  
Zeta Associates

## **GOVERNMENT AGENCIES AND OTHER ORGANISATIONS MENTIONED IN THIS REPORT**

Aeronautical Defence Establishment (ADE) (India)  
Al-Qaeda  
Australian Army  
Australian Defence Force (ADF)  
Australian Defence Materiel Organisation (DMO)  
Brazilian Air Force  
Brazilian Federal Police  
Brazilian Marine Corps  
British Army  
British Army Royal Artillery  
British Army Royal Artillery 32 Regiment  
Canadian Department of National Defense (DND)  
Canadian Forces (CF)  
Chilean Air Force  
EuroHawk GmbH  
French Air Force  
French Army  
French DGA (defence procurement agency)  
French Ministry of Defence  
French National Assembly  
French Navy  
German Air Force  
German Army  
German Ministry of Defence  
German Navy  
Indian Air Force  
Indian Army  
Indian Coast Guard  
Indian Defence Research and Development Organisation (DRDO)  
Indian Ministry of Defence  
Indian Navy  
International Security Assistance Force (ISAF)

Iraqi Air Force (IqAF)  
Iraqi Ministry of Defence  
Israel Defence Forces (IDF)  
Israeli Air Force (IAF)  
Israeli Defence Forces (IDF) Ground Forces Command (GFC)  
Israeli Ministry of Defence  
Italian Air Force  
Italian Air Force 28th Squadron  
Italian Air Force 32nd Wing  
Italian Ministry of Defence  
Italian Navy  
Italian Parliament  
Japanese Coast Guard  
Japanese Defence Ministry Technical Research and Development Institute  
Japanese Maritime Self-Defence Force (JMSDF)  
Japanese Ministry of Defence  
Jordanian Armed Forces (JAF)  
Mexican Navy  
MFAS Multi-Function Active Sensor  
NATO Airborne Early Warning Force (NAEWF)  
North Atlantic Treaty Organisation (NATO)  
Pakistan Air Force  
Pakistan Army  
Pakistan Navy  
Pakistan Aeronautical Complex (PAC)  
People's Liberation Army (PLA)  
People's Liberation Army Air Force (PLAAF)  
People's Liberation Army Navy (PLAN)  
Polish Army  
Public Works and Government Services Canada (PWGSC)  
Republic of China Air Force  
Republic of Korea Air Force (ROKAF)  
Republic of Korea Army (ROKA)  
Republic of Korea Navy (ROKN)  
Republic of Singapore Air Force (RSAF)  
Republic of Singapore Air Force (RSAF) 128th Squadron  
Republic of Singapore Air Force (RSAF) UAV Command  
Republic of Singapore Navy (RSN)  
Republic of Singapore Navy (RSN)



Royal Australian Air Force (RAAF)  
Royal Australian Navy (RAN)  
Royal Canadian Air Force (RCAF) (formerly Canadian Forces Air Command)  
Russian Air Force  
Singaporean Armed Forces (SAF)  
Singaporean Army  
Singaporean Ministry of Defence (MINDEF)  
South Korean Agency for Defense Development  
South Korean Defense Acquisition Program Administration (DAPA)  
Spanish Ministry of Defence  
Spanish Navy  
Spanish State Aviation Safety Agency  
Swedish Air Force  
Turkish Air Force  
Turkish Navy  
UK Labour Party  
UK Ministry of Defence (MoD)  
UK Royal Air Force (RAF)  
UK Royal Air Force (RAF) 23 Squadron  
UK Royal Air Force (RAF) 39 Squadron  
UK Royal Air Force (RAF) 8 Squadron  
UK Royal Air Force (RAF) XIII Squadron  
UK Royal Navy  
UK Royal Navy Fleet Air Arm  
United Arab Emirates (UAE) Air Force  
US Air Force (USAF)  
US Air Force (USAF) 116th Air Control Wing  
US Air Force (USAF) 332nd Air Expeditionary Wing  
US Air Force (USAF) 362nd Expeditionary Reconnaissance Squadron  
US Air Force Research Laboratory (AFRL)  
US Army  
US Central Command (CENTCOM)  
US Central Intelligence Agency (CIA)  
US Coast Guard  
US Congress  
US Congressional Budget Office (CBO)  
US Cruise Missile Defense Systems Project Office  
US Defense Advanced Research Projects Agency (DARPA)  
US Defense Security Cooperation Agency (DSCA)

US Department of Defense (DoD)  
US Department of Homeland Security (DHS)  
US Department of Homeland Security (DHS) Office of Air and Marine (OAM)  
US Federal Aviation Administration (FAA)  
US Marine Corps (USMC)  
US Maritime Patrol and Reconnaissance Force (MPRF)  
US National Guard  
US Naval Air Systems Command (NAVAIR)  
US Naval Air Warfare Center Aircraft Division (NAWCAD)  
US Naval Air Warfare Center Weapons Division (NAWCWD)  
US Navy  
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