

Australia C4ISR Market - Growth, Trends, Covid-19 Impact, and Forecasts (2023 - 2028)

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Report description:

The Australian C4ISR market is anticipated to register a CAGR of over 4% during the forecast period.

The Australian government increased its defense expenditure from 26.08 billion in 2019 to 27.54 billion in 2020 even after the pandemic and further USD 31.75 billion in 2021. The government is highly focused on enhancing defense capabilities due to rising tensions among neighboring countries in Asia Pacific and cross-border conflicts. An increase in the number of security attacks and global terrorism activities has led to increasing investments by the government in advanced surveillance technologies for military and law enforcement agencies. The procurement of unmanned air, land, and sea platforms for carrying out intelligence, surveillance, and reconnaissance missions may drive the growth of the market during the forecast period. Also, the modernization of the threat perception capabilities of the defense forces in Australia is anticipated to drive the demand for C4ISR systems in the country.

Australia C4ISR Market Trends

Growing Military Expenditure is Driving the Market Growth

Australia increased its defense spending in the past few years to support the nation's need for enhanced regional and global security. According to the Stockholm International Peace Research Institute (SIPRI) report 2021, the Australian government allocated a defense budget of USD 31.8 billion in 2021 which showed an increase of 4% from the previous year. The Australian government planning to invest USD 6.3 billion over the next decade in resilience, effects, defense, space, intelligence, cyber, and enablers (Redspice).

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Furthermore, an increasing number of military personnel leads to a growing demand for advanced communication systems driving the market growth. According to Australia's Ministry of Defense, over 2,300 defense personnel are deployed around the world, including operations in the Middle East and Afghanistan. Australia is investing significantly in developing its surveillance capabilities to protect its land and sea borders. The government plans to invest more than USD 200 billion over the next decade in programs, such as the procurement of F-35 and P-8A Poseidon maritime surveillance aircraft, naval shipbuilding program, upgrade of EA-18G Growler electronic attack aircraft and E-7A Wedgetail battlespace management aircraft, and other programs related to the improvement of the country's defense intelligence capabilities. The government also plans to invest in improving its cybersecurity to protect government networks from hostile cyberattacks. Thus, increasing expenditure on improving defense capabilities and procurement of advanced military communication systems will drive market growth during the forecast period.

Rising Spending on Enhancing Maritime ISR Capabilities to Boost the Market Growth

Australia has the largest area of ocean jurisdiction, globally. The country faces smuggling of people, drugs, and weapons; illegal fishing; and search and rescue at sea, making it an ideal market for sophisticated aerial surveillance technology. An increase in defense expenditure and rising procurement of advanced C4ISR systems to enhance defense capabilities drive market growth across the country. The government plans to use the new UAVs for maritime ISR missions, along with new P-8A Poseidon aircraft. The first Triton is expected to enter service in mid-2023, while the remaining are planned to be delivered before 2025.

Australia is also currently taking deliveries of its 12 P-8A Poseidon aircraft, and the deliveries are expected to be completed by 2022. The P-8As will replace Australia's AP-3C Orions for its naval support, maritime surveillance, search and rescue, and anti-submarine warfare roles. The growing influence of China on the waterways that are used by Australia for the transportation of goods with other Asian countries is expected to attract more investment from Australia in the coming years in maritime patrol and ISR missions. This is expected to propel the sea segment of the market during the forecast period.

Australia C4ISR Market Competitor Analysis

The Australia C4ISR market is fragmented in nature, with the presence of several players that provide a wide variety of products, like electro-optics, radars, and communication data links, for armed forces to perform intelligence, surveillance, and reconnaissance missions. Some of the prominent players in the market are L3Harris Technologies Inc., Elbit Systems Ltd, BAE Systems PLC, General Dynamics Corporation, and Lockheed Martin Corporation. Various companies are providing various C4ISR solutions to the country with reliable and secure wideband frequency bands.

For instance, in July 2022, Raytheon Technologies Corporation will equip Australian border surveillance aircraft with its latest SeaVue Multi-Role radar under a contract with Cobham Special Mission. Under the contract, Raytheon Technologies will upgrade Cobham's fleet of Dash 8 fixed-wing aircraft to the most advanced version of its SeaVue multi-domain surveillance radar for the support of Australian border protection operations.

Additional Benefits:

The market estimate (ME) sheet in Excel format
3 months of analyst support

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