Space-Based C4Isr Market - Growth, Trends, Covid-19 Impact, and Forecasts (2023 - 2028)

Market Report | 2023-01-23 | 100 pages | Mordor Intelligence

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Report description:

The space-based C4ISR market was valued at USD 2.75 billion in 2021, and it is anticipated to register a CAGR of about 5% during the forecast period (2022 - 2031).

The growing military spending of many countries is fueling the development and procurement of advanced space-based C4ISR systems. Defense spending continued its increasing trend in 2020 despite the economic impact of the COVID-19 pandemic. Although several launch programs for satellite-based C4ISR technologies were postponed in 2020 due to the pandemic, there were no major cancellations in planned launches.

The rising adoption of geospatial systems for better surveillance and faster response time has bolstered the growth prospects of the market. Technological advancements in microelectronics have been vital toward developing sophisticated space-based C4ISR systems with advanced features while diminishing associated R&D costs.

Countries are progressively adopting space-based systems for better situational awareness, secure and faster communication, and threat detection capabilities. On account of the capability enhancement initiatives undertaken by the global military powerhouses, high demand for space-based C4ISR systems is expected to drive the market during the forecast period.

Space-based C4ISR Market Trends

The ISR Segment held the Largest Market Share in 2021

Intelligence, surveillance, and reconnaissance are now critical to a nation's strategic defense. Many nations are actively employing

ISR systems throughout the entire spectrum to collect, process, and disseminate data in support of current and future national security needs. Several nations have powerful space-based image intelligence (IMINT) and are in the process of developing even greater capabilities. Satellites offer the necessary ISR information around-the-clock for the armed forces across the world, and with the development in sensor technology, space-based ISR missions are becoming cheaper, smaller, and lighter. The number of nations orbiting ISR satellites is increasing every year. Also, a few nations have developed satellite-based early warning systems designed to detect ICBMs during different flight phases. With the space domain fast becoming a key area of focus among major powers, about a fifth of all satellites launched each year belong to the military and are used for spying. Realizing the growing demand, several satellite manufacturers are developing newer generation ISR satellites for military customers. For instance, in April 2021, Lockheed Martin unveiled a new line of rapid, integrated, and affordable tactical Intelligence, Surveillance, and Reconnaissance (ISR) satellites. The United States is exploring and is interested in launching LEO and MEO satellite constellations, which have several advantages over GEO, where traditional military satellites fly. LEO satellites are smaller in size because they require less propulsion and less power, and data latency is also reduced. Such factors are expected to drive the growth of the segment during the forecast period.

North America is Expected to Register the Highest Growth Rate During the Forecast Period

The existence of a robust infrastructure framework for the rapid development and deployment of space-based C4ISR systems in North America has bolstered the growth of the market in the region. The United States has invested its vast technological prowess toward the indigenous development of several weapon systems to foster its military prowess over all dominions. The United States has deployed more space assets than any other country in the world, and it is heavily reliant on the deployed space framework to support and enhance its war-fighting capability. The US SOCOM envisions network-centric warfare as a vital domain for the expansion of joint operational programs by the defense forces. On this note, the United States is launching several satellites every year to extend its military communication capabilities. For instance, in June 2021, it was reported that the US Space Force launched a new special military satellite, Satellite Odyssey, into orbit. The Odyssey is a surveillance satellite used to detect extraneous objects moving in space. Likewise, in March 2021, the US Space Force awarded two contracts to the United Launch Alliance and SpaceX for four National Security Space Launch Phase 2 missions scheduled for 2023. While ULA was awarded USD 224.2 million for two missions named USSF-112 and USSF-87, SpaceX was awarded USD 159.7 million for USSF-36 and NROL-69. Several such launches are scheduled during the forecast period, thereby driving the North American market.

Space-based C4ISR Market Competitor Analysis

L3Harris Corporation, CACI International Inc., Northrop Grumman Corporation, and Lockheed Martin Corporation are some of the prominent players in the market. However, several other manufacturers provide C4ISR solutions for the space platform. Favorable government policies and the existing global security scenario are fostering strategic collaborations between regional and global market players to merge their technological prowess and together develop sophisticated space-based C4ISR systems. Major players in the market are actively participating in forming JVs and partnerships with these domestic market leaders in the Asia-Pacific region, which is estimated to be the next biggest market during the forecast period, with huge potential and demand for space-based C4ISR capabilities.

Additional Benefits:

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

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