Anti-Drone Market - Growth, Trends, Covid-19 Impact, and Forecasts (2023 - 2028)

Market Report | 2023-01-23 | 131 pages | Mordor Intelligence

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Report description:

The anti-drone market is valued at USD 914.21 million in 2021 and is poised to reach USD 4360.67 million by 2027, witnessing a CAGR of 29.68% during the forecast period (2023 - 2028).

The COVID-19 pandemic had a negligible impact on the anti-drone market. There is no significant impact on the demand from the military sector, as the defense expenditures of the global militaries increased even during the peak of the pandemic. Also, the procurement of counter UAV systems at airports and other critical infrastructures remained unaffected.

The demand for anti-drone systems is primarily due to the growing proliferation of cheaper, small drones. Incidents of security breaches by unidentified drones and the use of drones by terrorist groups are further propelling the demand for counter-drone technologies. Apart from the defense sector, the counter-drone systems are also being procured by homeland securities and law enforcement agencies to counter unidentified drones entering critical infrastructures.

Counter-drone systems come with their set of challenges at the level of performance, practicality, legality, and policy. The use of anti-drone jammers or unauthorized UAS detection and countermeasure deployments can result in electromagnetic and radio frequency (RF) interference, especially at airports, which can affect the safety of flight and air traffic management issues. Such limitations are expected to challenge the growth of the market during the forecast period.

Anti-Drone Market Trends

Military Segment Held the Largest Market Share in 2021

The military segment of the market accounted for a major share of the revenues in 2021. This is due to the increase in the use of drones by adversaries and insurgent groups for spying and attacking military infrastructure across the borders. Such incidents have necessitated the R&D of sophisticated C-UASs that can identify, track, and disable the drone and locate its operator

simultaneously. To facilitate the R&D efforts, a significant part of the defense budget is being allocated toward such systems. Also, several armed forces are also focusing on enhancing their counter-drone capabilities. In this regard, during FY 2021, the Japanese MoD allocated a USD 20 million budget toward the R&D of C-UAS technology. The MoD made provisions worth USD 4.8 million to research microwaves that can be used in a C-UAV system. Likewise, with the growing threats to naval vessels, as of July 2021, the French Navy announced its plan to test the HELMA-P laser effector, the anti-drone system developed by CILAS for naval vessels. The Navy plans to begin an assessment for their use in the maritime environment in 2022, and following the assessment, the armed force will test then onboard surface vessels in the coming years. Such developments are expected to drive market growth during the forecast period.

North America Expected to Dominate the Market During the Forecast Period

North America held the largest market share in 2021, and the region is also expected to continue its dominance over the market during the forecast period. This is primarily due to the increasing investments of the US Department of Defense (DoD) into the development and deployment of counter-drone systems. For instance, during FY 2022, the US DoD plans to spend at least USD 636 million on the R&D of C-UAV systems and around USD 75 million on the procurement of such systems. Also, in April 2021, the US Air Force released a request for proposals for the rapid research, development, prototyping, demonstration, evaluation, and transition of technologies that can be used to counter small unmanned aerial systems. By the end of 2021, the US Air Force may award the counter-UAV contract worth up to USD 490 million to provide the technologies to counter the threat of small, commercially made drones. The period of performance for the contract is 72 months. On the other hand, illegitimate drone incursions at airports and other critical infrastructure can result in safety issues, and they have raised concerns over the years across several such sites in the United States and Canada. With the advancement in technology, many counter-drone systems are expected to be installed by the various end users in the region to protect their critical infrastructure and assets of strategic importance over the coming years, which is also expected to drive the growth of the market in the region in the future.

Anti-Drone Market Competitor Analysis

Some of the prominent players in the anti-drone market are Raytheon Technologies Corporation, Lockheed Martin Corporation, QinetiQ Group PLC, Thales Group, and Israel Aerospace Industries. Several start-ups are also entering the market with innovative products, which are further increasing the competition in the market. The proliferation of local players is also increasing in the market, supplying various anti-drone solutions. On this note, in August 2021, the Turkish company Meteksan Defence presented an upgraded version of its Kapan counter-drone system at the IDEF 2021. The system features a new version of the Retinar FAR-AD Drone Detection Radar with a new antenna tailored for precise detection of mini/micro unmanned aerial vehicles (UAVs), high-performance hardware, and specific algorithms supported by artificial intelligence technologies. These developments will likely benefit industry stakeholders during the forecast period. Several companies are focused on developing counter-drone technologies that can be useful for the global militaries, which can fetch long-term contracts and help the companies to expand their market share in the coming years. With the growing investments in new products and the increasing demand from the defense and commercial sector, the anti-drone market is becoming highly lucrative and offers significant opportunities for both the existing and new players in the market.

Additional Benefits:

The market estimate (ME) sheet in Excel format
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