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Battlefield Management Systems Market - Growth, Trends, Covid-19 Impact, and Forecasts (2023 - 2028)

Market Report | 2023-01-23 | 106 pages | Mordor Intelligence

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Report description:

The battlefield management systems market is expected to register a CAGR of over 5% during the forecast period (2022 - 2027).

The COVID-19 pandemic had a minor impact on the market. Even during the pandemic, the demand for battlefield management systems has grown due to increased military conflicts between many nations. Furthermore, the global military expenditure increase is expected to drive the procurement of various weapon systems and related battle management systems. According to the Stockholm International Peace Research Institution (SPIRI), the global military expenditure exceeded USD 2.1 Trillion in 2021, indicating the willingness among the militaries to spend high amounts on defense purchases like battlefield management systems.

Modern military systems rely heavily on complex software and interconnectivity to perform their missions. Advanced features, such as an electronic attack, sensor fusion, and communications, of the cyber-enabled military systems provide a tactical edge to the equipped armed forces against an adversary force or during critical operations in a hostile environment. The emergence of sophisticated weapon systems has necessitated the adoption of advanced battlefield management systems to facilitate decision-making and mission-critical coordination across all end-user platforms.

Battlefield Management Systems Market Trends

Navy Segment is Expected to grow with the Higest CAGR During the Forecast period

The growth of territorial conflicts and border issues increased the risk for maritime assets of militaries, which has led to increasing emphasis on surveillance, threat detection, and target identification at sea. To ensure combat readiness of existing naval systems, several modernization programs are currently underway to upgrade the capabilities of the regional naval forces. Several global navies are investing in procuring frigates, corvettes, offshore patrol vessels (OPVs), and other vessels for patrolling applications. These constructions necessitate installing advanced battlefield management systems onboard the vessels. For instance, the Tamandare-class frigates of the Brazilian Navy, whose construction is planned to begin by the end of 2022 and enter service by 2026, are equipped with the ANCS combat management system of Atlas Elektronik. The ANCS CMS will interface and provide data fusion for the coordinated use of sensors, weapon systems, etc. The sensors include an Atlas Elektronik ASO 713 hull-mounted radar, X and S-band radars for navigation and search from Raytheon Technologies, Hensoldt's TRS-4D multifunction surveillance and target acquisition radar, along with Two Paseo XLR electro-optical sights of Safran that will detect and identify small vessels in poor at-sea conditions. Thus, the focus on the naval forces installing advanced battlefield management systems in their naval vessels to enhance their capabilities is anticipated to accelerate the segment's growth in the coming years.

Asia-Pacific Will Dominate the Markey During the Forecast Period

Asia-Pacific held the largest market share among all the regions in 2021 due to the huge emphasis of the countries in the region to develop their battlefield management capabilities. The territorial conflicts among the counties are increasing each year. To address the evolving threats, major countries in the region are realigning their military strategies and organizational structures. To ensure combat readiness of existing systems, several weapon modernization programs are currently underway to effectively upgrade the capabilities of the regional armed forces for effectively responding to security threats and accomplishing urgent, critical, and dangerous strategic missions. As a result, the military investments of various countries in the region have increased significantly towards developing and procuring better battlefield management systems. For instance, China, which accounted for a total of USD 293 billion in military expenditure in 2021, is developing its battle management and command and control capabilities. As part of this, China plans to enhance the PLA's joint command and control system capabilities in the coming years. Similarly, India spent a total of USD 76.6 Billion on military expenditure, developing its military capabilities. The country is also investing in better battle management systems to increase the armed forces' combat capabilities. In January 2022, Ultra Electronics, an aerospace and defense engineering company, secured an integrated anti-submarine warfare defense suite (IADS) contract with the Indian Navy. The contract was also awarded as a collaboration with Mahindra Defense Systems with a deal value worth approximately GBP 60 million. Several such developments across the region are expected to drive the market with a significant growth rate during the forecast period.

Battlefield Management Systems Market Competitor Analysis

The prominent players in the Battlefield Management Systems Market are Raytheon Technologies Corporation, ASELSAN AS, L3Harris Technologies Inc., BAE Systems PLC, and Saab AB, amongst others. Vendors are modifying their offerings to enhance current capabilities and introduce revolutionary features to deliver value-added battlefield management solutions to end-users. This helps introduce low-differentiated products at competitive pricing. Furthermore, a strategic collaboration between manufacturers is on the rise to develop sophisticated systems conforming to the end-users' design and performance specifications. This is also expected to benefit industry stakeholders during the forecast period. The growth in the focus on the indigenous development of the battlefield management systems is expected to help the entry of new players, thereby making the market more competitive in the coming years.

Additional Benefits:

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

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