

Naval Isr Market - Growth, Trends, Covid-19 Impact, and Forecasts (2023 - 2028)

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Report description:

The Naval ISR market is anticipated to grow at a CAGR of 3.5% during the forecast period.

The COVID-19 pandemic hugely impacted various naval ISR manufacturing plants and industries worldwide. Many manufacturing companies witnessed a decline in orders due to the lack of components and equipment. This led to a disruption in the manufacturing schedules of the naval ISR companies. Moreover, manufacturers of naval ISR systems also faced delivery challenges owing to border restrictions imposed by various countries and bottlenecks in the supply chain. With the end of the pandemic and the reopening of global borders, there was an increase in the number of orders for naval ISR systems by various governments, and this, in turn, led to many manufacturers increasing their production capacities to meet the surge in demand for naval ISR systems and this will lead to the growth in the market in the coming years.

The demand for naval ISR is anticipated to experience substantial growth during the forecast period, primarily due to their broad application and scope, especially in the commercial and defense sectors. Naval ISR is used for activities such as navigating the ocean floor, detecting enemy threat vessels, mapping out the ocean floor, and improving the situational awareness of military and commercial naval vessels.

The significant increase in defense spending and procurement programs by various countries in recent years and the increasing usage of artificial intelligence shall propel the market's growth in the coming years. According to the data released by the Stockholm International Peace Research Institute (SIPRI), world military spending witnessed growth in 2021, reaching an all-time high of USD 2.1 trillion.

Naval ISR Market Trends

Underwater Vessel ISR is Expected to Witness Growth During the Forecast Period

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The underwater vessel ISR segment is expected to grow during the forecast period. The development of territorial conflicts and border issues increased the risk for maritime assets of militaries, which led to increasing emphasis on surveillance, threat detection, and target identification at sea. Several modernization programs are currently underway to upgrade the capabilities of regional naval forces to ensure the combat readiness of existing underwater naval systems. Intelligence, surveillance, and reconnaissance ISR is a key mission area for current military applications. While it involves all platforms on land, air, and sea, the emerging capabilities of unmanned underwater vehicles (UUVs) will provide a new dimension to ISR operations. Unmanned vehicle programs are currently progressing toward a variety of applications, ranging from UAVs equipped with non-acoustic sensors for large-area search to crewless surface vehicles (USVs) equipped with active sources as part of multistatic operations and crewless underwater vehicles (UUVs) relying on special onboard sensors that can support covert tracking and trailing operations against adversaries' submarines during prehostilities. In addition, crewless underwater vehicles' command and control (C2) is not mature and will ultimately depend on acoustic and RF communications advances. For example, advanced acoustic communications techniques between UUVs, surveillance arrays, and host SSNs must be stealthy and reliable to facilitate future covert operations off an adversary's coast. Moreover, ongoing efforts at the Naval Warfare Systems Center SSC San Diego will combine expertise in both ISR and UUV systems to meet the requirements for global militaries in terms of naval ISR. Thus, such advancements will lead to growth in the market during the forecast period.

North America Is The Largest Market For Naval ISR Systems Globally

The North American region is the largest market for Naval ISR systems. The increased adaptation of advanced ISR technologies, such as artificial intelligence integration, increasing defense expenditure, and growing naval threats will significantly extend to the North American region during the forecasted period. As of 2022, the United States Navy plans to adopt AI-based navigation on their manned vessels. As part of the decision, Naval Sea Systems Command (NAVSEA) sought information on the technologies which can be integrated into the existing bridge systems, such as electronic chart displays and information systems. Increasing investments in terms of the development of advanced naval ISR systems in the region to support the navy in carrying out intelligence, surveillance, and reconnaissance missions has also provided a boost to the naval ISR manufacturing companies which are based in the North American region to develop advanced products, and this shall lead to the area experiencing significant growth during the forecast period.

Naval ISR Market Competitor Analysis

The most prominent players in the Naval ISR market are BAE Systems, General Dynamics Corporation, L3 Harris Technologies, Lockheed Martin Corporation, and Thales Group.

Various companies now focus on growth strategies, including developing and launching new products, product approvals, and patents. In the current scenario, countries are looking to procure more advanced naval-based ISR systems to tackle and carry out more strategic ISR missions easily.

Implementing new technologies such as artificial intelligence and machine learning helps vessels plan and execute ISR missions. Focus on developing more recent and advanced ISR technologies while keeping the overall costs low is one of the main factors taken care of by the OEMs.

Additional Benefits:

The market estimate (ME) sheet in Excel format
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Table of Contents:

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1 INTRODUCTION

1.1 Study Assumptions

1.2 Scope of the Study

2 RESEARCH METHODOLOGY

3 EXECUTIVE SUMMARY

4 MARKET DYNAMICS

4.1 Market Overview

4.2 Market Drivers

4.3 Market Restraints

4.4 Industry Attractiveness/Porters Five Force Analysis

4.4.1 Threat of New Entrants

4.4.2 Bargaining Power of Buyers/Consumers

4.4.3 Bargaining Power of Suppliers

4.4.4 Threat of Substitute Products

4.4.5 Intensity of Competitive Rivalry

5 MARKET SEGMENTATION

5.1 By Type

5.1.1 Surface Vessel ISR

5.1.2 Underwater Vessel ISR

5.2 By Operation

5.2.1 Defense

5.2.2 Commercial

5.3 By Application

5.3.1 Search & Rescue

5.3.2 Intelligence Gathering

5.3.3 Coastal Surveillance

5.3.4 Tactical Support

5.4 By Geography

5.4.1 North America

5.4.1.1 United States

5.4.1.2 Canada

5.4.2 Europe

5.4.2.1 Germany

5.4.2.2 United Kingdom

5.4.2.3 France

5.4.2.4 Russia

5.4.2.5 Spain

5.4.2.6 Rest of Europe

5.4.3 Asia-Pacific

5.4.3.1 China

5.4.3.2 India

5.4.3.3 Japan

5.4.3.4 South Korea

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- 5.4.3.5 Rest of Asia-Pacific
- 5.4.4 Latin America
 - 5.4.4.1 Brazil
 - 5.4.4.2 Latin America
- 5.4.5 Middle East
 - 5.4.5.1 United Arab Emirates
 - 5.4.5.2 Saudi Arabia
 - 5.4.5.3 Rest of Middle East

6 COMPETITIVE LANDSCAPE

- 6.1 Vendor Market Share
- 6.2 Company Profiles
 - 6.2.1 BAE Systems PLC
 - 6.2.2 General Dynamics Corporation
 - 6.2.3 L3 Harris Technologies
 - 6.2.4 Lockheed Martin Corporation
 - 6.2.5 Thales Group
 - 6.2.6 Atlas Elektronik
 - 6.2.7 Leonardo SpA
 - 6.2.8 Northrop Grumman Corporation
 - 6.2.9 Ultra Electronics
 - 6.2.10 Elbit Systems
 - 6.2.11 Kratos Defense and Security Solutions
 - 6.2.12 Rheinmetall Defense

7 MARKET OPPORTUNITIES AND FUTURE TRENDS

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