

## **Anti-aircraft Warfare Market by Capability (Support, Protection and Attack), System (Weapon System, Radar System, Electronic Warfare System, Command and Control System), Platform (Land , Naval and Airborne), Range & Region - Forecast to 2028**

Market Report | 2023-11-21 | 272 pages | MarketsandMarkets

### **AVAILABLE LICENSES:**

- Single User \$4950.00
- Multi User \$6650.00
- Corporate License \$8150.00
- Enterprise Site License \$10000.00

### **Report description:**

The global anti-aircraft warfare market size is projected to grow from USD 20.9 billion in 2023 to USD 28.6 billion by 2028, at a CAGR of 6.5% from 2023 to 2028. The Anti-aircraft warfare market is expected to witness growth due to growing threats from unmanned aerial vehicles and the increasing development of indigenous air defense systems. Furthermore, increasing number of conflicts, and high defense spending are some of the major factors driving the market globally.

However, Technical challenges of counter-unmanned aerial vehicles (C-UAV) and development of hypersonic weapons poses a challenge for Anti-aircraft warfare market growth.

Lockheed Martin Corporation (US), Raytheon Technologies Corporation (US), Thales Group (France), BAE Systems (UK), and General Dynamics Corporation (US) are some of the leading players operating in the Anti-aircraft warfare market. These companies secure contracts from governments of different countries.

"The attack segment to account for largest market share in the anti-aircraft warfare market during the forecast period."

Based on capability, the market segmented into support, protection, and attack. The Attack segment is estimated to account for the largest share of 67.1% of the anti-aircraft warfare market in 2023. The growth of attack capability of anti-aircraft warfare system is propelled by numerous contracts for procurement of attack-based weapon systems.

"The weapon system segment is projected to register the highest CAGR during the forecast period."

Based on systems, weapon systems are expected to dominate the anti-aircraft warfare market in 2023, with the naval segment accounting for the largest share of 44% and highest CAGR of 7.1% during the forecast period. The increased need for directed energy and missile-based anti-aircraft defense systems is the reason for the rapid expansion of weaponry.

**Scotts International. EU Vat number: PL 6772247784**

tel. 0048 603 394 346 e-mail: [support@scotts-international.com](mailto:support@scotts-international.com)

[www.scotts-international.com](http://www.scotts-international.com)

"The naval segment to account for largest market share in the anti-aircraft warfare market during the forecast period." The market for anti-aircraft warfare systems is segmented into land, naval and airborne platforms. The type of system that is most in demand is naval platforms with a market share of 55.1%. The anti-aircraft defense systems mounted on naval platforms like naval ships and unmanned surface vehicles are in huge demand due to the development and procurement of these systems.

"By range, the long-range segment is estimated to register highest growth in the anti-aircraft warfare market." Based on range, the market is segmented into short range (<20 KM), medium range (20 - 100 km), and long range (>100 km). The long range (>100 km). The long-range segment is projected to reach USD 4.87 billion in 2028 from USD 3.38 billion in 2023, growing at a CAGR of 7.6%. The procurement of long-range air defense systems designed to provide protection against a wide range of aerial threats, including enemy aircraft, helicopters, drones, and anti-ship missiles, at longer distances from the ship will drive market.

"The Asia Pacific market is projected to grow at highest CAGR during the forecast period." Asia Pacific is projected to grow at highest CAGR of 7.1% in the anti-aircraft warfare market during the forecast period. The growth of the Asia Pacific market is anticipated to be the highest as China and India are both procuring and developing air defense systems due to China's expansion plan and India's unstable borders with two countries with nuclear weapons.

#### Breakdown of primaries

The study contains insights from various industry experts, ranging from component suppliers to Tier 1 companies and OEMs. The break-up of the primaries is as follows:

- By Company Type: Tier 1-35%; Tier 2-45%; and Tier 3-20%
- By Designation: C Level-35%; Directors-25%; and Others-40%
- By Region: North America-35%; Europe-20%; Asia Pacific-30%; Middle East-10%; and RoW-5%

Lockheed Martin Corporation (US), Raytheon Technologies Corporation (US), Thales Group (France), BAE Systems (UK), and General Dynamics Corporation (US) are some of the leading players operating in the Anti-aircraft warfare market.

#### Research Coverage

The study covers the anti-aircraft warfare market across various segments and subsegments. It aims at estimating the size and growth potential of this market across different segments based on Capability, System, Platform, Range and Region. This study also includes an in-depth competitive analysis of the key players in the market, along with their company profiles, key observations related to their product and business offerings, recent developments undertaken by them, and key market strategies adopted by them.

Key benefits of buying this report: This report will help the market leaders/new entrants in this market with information on the closest approximations of the revenue numbers for the overall anti-aircraft warfare market and its subsegments. The report covers the entire ecosystem of the anti-aircraft warfare industry. It will help stakeholders understand the competitive landscape and gain more insights to position their businesses better and plan suitable go-to-market strategies. The report will also help stakeholders understand the pulse of the market and provide them with information on key market drivers, restraints, challenges, and opportunities.

The report provides insights on the following pointers:

- Analysis of key drivers and several factors, such as Russia-Ukraine Conflict, increasing development of indigenous air defense systems, proliferation of advanced technologies like stealth and electronic countermeasures in aircraft and others that could contribute to an increase in anti-aircraft warfare market.
- Product Development/Innovation: Detailed insights on upcoming technologies, research & development activities, and new product & service launches in the anti-aircraft warfare market
- Market Development: Comprehensive information about lucrative markets - the report analyses the anti-aircraft warfare market

**Scotts International. EU Vat number: PL 6772247784**

tel. 0048 603 394 346 e-mail: [support@scotts-international.com](mailto:support@scotts-international.com)

[www.scotts-international.com](http://www.scotts-international.com)

across varied regions

- Market Diversification: Exhaustive information about new products & services, untapped geographies, recent developments, and investments in anti-aircraft warfare market
- Competitive Assessment: In-depth assessment of market shares, growth strategies, and service offerings of leading players like Lockheed Martin Corporation (US), Raytheon Technologies Corporation (US), Northrop Grumman Corporation (US), BAE Systems PLC (UK), Thales Group (France), among others in the Anti-aircraft warfare market.

## Table of Contents:

1INTRODUCTION35

1.1STUDY OBJECTIVES35

1.2MARKET DEFINITION35

1.3STUDY SCOPE36

1.3.1MARKETS COVERED36

1.3.2REGIONAL SCOPE36

1.4YEARS CONSIDERED37

1.5INCLUSIONS AND EXCLUSIONS37

TABLE 1ANTI-AIRCRAFT WARFARE MARKET: INCLUSIONS AND EXCLUSIONS37

1.6CURRENCY CONSIDERED38

TABLE 2USD EXCHANGE RATES38

1.7STAKEHOLDERS38

1.8RECESSION IMPACT ANALYSIS (RIA)38

2RESEARCH METHODOLOGY39

2.1RESEARCH DATA39

FIGURE 1RESEARCH PROCESS FLOW39

FIGURE 2RESEARCH DESIGN40

2.1.1SECONDARY DATA40

2.1.1.1Key data from secondary sources41

2.1.2PRIMARY DATA41

2.1.2.1Key industry insights41

2.1.2.2Key data from primary sources42

2.1.2.3Breakdown of primary interviews42

FIGURE 3BREAKDOWN OF PRIMARY INTERVIEWS: BY COMPANY TYPE, DESIGNATION, AND REGION42

2.2FACTOR ANALYSIS43

2.2.1INTRODUCTION43

2.2.2DEMAND-SIDE INDICATORS43

2.2.3SUPPLY-SIDE INDICATORS43

2.3RECESSION IMPACT44

2.4IMPACT OF RUSSIA'S INVASION OF UKRAINE44

2.4.1IMPACT OF RUSSIA'S INVASION OF UKRAINE ON MACRO FACTORS OF DEFENSE INDUSTRY44

FIGURE 4IMPACT OF RUSSIA?UKRAINE WAR ON MACRO FACTORS OF DEFENSE INDUSTRY45

2.4.2IMPACT OF RUSSIA'S INVASION OF UKRAINE ON MICRO FACTORS OF DEFENSE INDUSTRY47

FIGURE 5IMPACT OF RUSSIA-UKRAINE WAR ON MICRO FACTORS OF ANTI-AIRCRAFT WARFARE MARKET49

2.5MARKET SIZE ESTIMATION49

2.5.1BOTTOM-UP APPROACH50

FIGURE 6MARKET SIZE ESTIMATION METHODOLOGY: BOTTOM-UP APPROACH51

2.5.2TOP-DOWN APPROACH52

FIGURE 7MARKET SIZE ESTIMATION METHODOLOGY: TOP-DOWN APPROACH52

**Scotts International. EU Vat number: PL 6772247784**

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

2.6	DATA TRIANGULATION	53
FIGURE 8	DATA TRIANGULATION	53
2.7	RESEARCH ASSUMPTIONS	54
2.8	RESEARCH LIMITATIONS	55
2.9	RISK ASSESSMENT	55
3	EXECUTIVE SUMMARY	56
FIGURE 9	ATTACK CAPABILITY SEGMENT TO ACCOUNT FOR LARGEST MARKET SHARE DURING FORECAST PERIOD	56
FIGURE 10	WEAPON SYSTEM SEGMENT TO SECURE LEADING MARKET POSITION DURING FORECAST PERIOD	57
FIGURE 11	NAVAL PLATFORM SEGMENT TO CAPTURE DOMINANT MARKET SHARE DURING FORECAST PERIOD	57
FIGURE 12	MEDIUM RANGE SEGMENT TO ACQUIRE MAXIMUM MARKET SHARE IN 2023	58
FIGURE 13	ASIA PACIFIC TO BE FASTEST-GROWING REGIONAL-LEVEL MARKET DURING FORECAST PERIOD	58
4	PREMIUM INSIGHTS	60
4.1	ATTRACTIVE OPPORTUNITIES FOR PLAYERS IN ANTI-AIRCRAFT WARFARE MARKET	60
FIGURE 14	INCREASING DEMAND FOR WEAPON SYSTEMS TO DRIVE MARKET DURING FORECAST PERIOD	60
4.2	ANTI-AIRCRAFT WARFARE MARKET, BY SYSTEM	60
FIGURE 15	WEAPON SYSTEM SEGMENT TO DOMINATE MARKET IN 2023	60
4.3	ANTI-AIRCRAFT WARFARE MARKET, BY PLATFORM	61
FIGURE 16	NAVAL PLATFORM SEGMENT TO RECORD HIGHEST CAGR DURING FORECAST PERIOD	61
4.4	ANTI-AIRCRAFT WARFARE MARKET, BY RANGE	61
FIGURE 17	MEDIUM RANGE SEGMENT TO RECORD LARGEST MARKET SHARE DURING 2023	61
4.5	ANTI-AIRCRAFT WARFARE MARKET, BY COUNTRY	62
FIGURE 18	RUSSIA TO BE FASTEST-GROWING COUNTRY-LEVEL MARKET DURING FORECAST PERIOD	62
5	MARKET OVERVIEW	63
5.1	INTRODUCTION	63
5.2	MARKET DYNAMICS	64
FIGURE 19	DRIVERS, RESTRAINTS, OPPORTUNITIES, AND CHALLENGES IN ANTI-AIRCRAFT WARFARE MARKET	64
5.2.1	DRIVERS	64
5.2.1.1	Russia-Ukraine conflict	64
TABLE 3	US SECURITY ASSISTANCE BETWEEN JANUARY 20, 2020 AND SEPTEMBER 6, 2023	65
5.2.1.2	Increasing development of indigenous air defense systems	65
5.2.1.3	Proliferation of advanced technologies, including stealth and electronic countermeasures in aircraft	66
5.2.1.4	Growing threats from unmanned aerial vehicles	66
FIGURE 20	ARMED DRONES ACQUIRED, USED, AND DEVELOPED BY VARIOUS COUNTRIES FROM 2000 TO 2020	67
5.2.2	RESTRAINTS	67
5.2.2.1	Stringent regulations for arms transfer	67
5.2.2.2	High development and procurement cost of air defense systems	67
5.2.3	OPPORTUNITIES	68
5.2.3.1	Miniaturization of warheads	68
5.2.3.2	Adoption of AI in air and missile defense	68
5.2.3.3	Development of directed energy-based air defense systems	69
5.2.4	CHALLENGES	69
5.2.4.1	Technical challenges of counter-unmanned aerial vehicles	69
5.2.4.2	Development of hypersonic weapons	69
5.3	TRENDS/DISRUPTIONS IMPACTING CUSTOMER BUSINESS	70
5.3.1	REVENUE SHIFT & NEW REVENUE POCKETS FOR ANTI-AIRCRAFT WARFARE SYSTEM MANUFACTURERS	70
FIGURE 21	REVENUE SHIFT IN ANTI-AIRCRAFT WARFARE MARKET	70
5.4	VALUE CHAIN ANALYSIS	71

FIGURE 22	VALUE CHAIN ANALYSIS	71
5.5	SUPPLY CHAIN ANALYSIS	72
FIGURE 23	SUPPLY CHAIN ANALYSIS	73
5.6	ECOSYSTEM ANALYSIS	73
5.6.1	PROMINENT COMPANIES	73
5.6.2	PRIVATE AND SMALL ENTERPRISES	73
5.6.3	END USERS	73
FIGURE 24	ECOSYSTEM ANALYSIS	74
TABLE 4	ANTI-AIRCRAFT WARFARE MARKET: ROLE OF COMPANIES IN ECOSYSTEM	74
FIGURE 25	MARKET MAP	75
5.7	TRADE ANALYSIS	76
5.7.1	IMPORT AND EXPORT DATA FOR RADAR SYSTEMS, BY REGION/COUNTRY	76
TABLE 5	RADAR APPARATUS: REGION-WISE IMPORT DATA, 2018?2022 (USD THOUSAND)	76
FIGURE 26	COUNTRY-WISE IMPORTS, 2018?2022 (USD MILLION)	76
TABLE 6	RADAR APPARATUS: COUNTRY-WISE IMPORT DATA, 2018?2022 (USD THOUSAND)	77
TABLE 7	RADAR APPARATUS: REGION-WISE EXPORT DATA, 2018?2022 (USD THOUSAND)	77
FIGURE 27	COUNTRY-WISE EXPORTS, 2018?2022 (USD MILLION)	77
TABLE 8	RADAR APPARATUS: COUNTRY-WISE EXPORT DATA, 2018?2022 (USD THOUSAND)	78
5.8	PRICING ANALYSIS	78
5.8.1	INDICATIVE PRICING ANALYSIS	78
TABLE 9	INDICATIVE PRICING LEVELS OF ANTI-AIRCRAFT WARFARE SOLUTIONS	79
TABLE 10	AVERAGE SELLING PRICE OF ANTI-AIRCRAFT WARFARE SYSTEMS DERIVED THROUGH PRICING MODEL	79
5.9	USE CASE ANALYSIS	80
TABLE 11	PROTECTION OF NAVAL TASK FORCE	80
TABLE 12	DEFENSE AGAINST BALLISTIC MISSILE	80
5.10	PORTER'S FIVE FORCES ANALYSIS	81
TABLE 13	IMPACT PORTER'S FIVE FORCES	81
FIGURE 28	PORTER'S FIVE FORCES ANALYSIS	81
5.10.1	THREAT OF NEW ENTRANTS	82
5.10.2	THREAT OF SUBSTITUTES	82
5.10.3	BARGAINING POWER OF SUPPLIERS	82
5.10.4	BARGAINING POWER OF BUYERS	82
5.10.5	INTENSITY OF COMPETITIVE RIVALRY	82
5.11	REGULATORY LANDSCAPE	82
TABLE 14	NORTH AMERICA: REGULATORY BODIES, GOVERNMENT AGENCIES, AND OTHER AGENCIES	83
TABLE 15	EUROPE: REGULATORY BODIES, GOVERNMENT AGENCIES, AND OTHER AGENCIES	83
TABLE 16	ASIA PACIFIC: REGULATORY BODIES, GOVERNMENT AGENCIES, AND OTHER AGENCIES	84
TABLE 17	MIDDLE EAST: REGULATORY BODIES, GOVERNMENT AGENCIES, AND OTHER AGENCIES	84
TABLE 18	REST OF THE WORLD: REGULATORY BODIES, GOVERNMENT AGENCIES, AND OTHER AGENCIES	85
5.12	KEY CONFERENCES AND EVENTS	85
TABLE 19	KEY CONFERENCES AND EVENTS, 2023?2024	85
5.13	KEY STAKEHOLDERS AND BUYING CRITERIA	86
5.13.1	KEY STAKEHOLDERS IN BUYING PROCESS	86
FIGURE 29	INFLUENCE OF STAKEHOLDERS ON BUYING PROCESS FOR 3 PLATFORMS	86
TABLE 20	INFLUENCE OF STAKEHOLDERS ON BUYING PROCESS FOR 3 PLATFORMS (%)	86
5.13.2	BUYING CRITERIA	87
FIGURE 30	KEY BUYING CRITERIA FOR 3 PLATFORMS	87

TABLE 21 KEY BUYING CRITERIA FOR 3 PLATFORMS 87

6 INDUSTRY TRENDS 88

6.1 INTRODUCTION 88

6.2 TECHNOLOGY TRENDS 89

6.2.1 HIGH ENERGY LASER TECHNOLOGY 89

6.2.2 ADVANCED MATERIALS FOR ELECTRONIC WARFARE SYSTEMS 89

6.2.3 COUNTER UNMANNED AERIAL SYSTEM (C-UAS) 90

6.2.4 ELECTRO-OPTICAL AND INFRARED SENSORS 90

6.2.5 COOPERATIVE ENGAGEMENT CAPABILITY (CEC) 91

6.2.6 ADVANCED TACTICAL DATA LINKS 91

6.3 IMPACT OF MEGATRENDS 92

6.3.1 SIGNIFICANT INVESTMENTS BY EMERGING ECONOMIES 92

6.3.2 ACTIVE ELECTRONICALLY SCANNED ARRAY (AESA) RADARS 92

6.3.3 NEXT-GENERATION MISSILE SEEKERS 93

6.4 INNOVATIONS AND PATENT REGISTRATIONS 93

FIGURE 31 TOP PATENT OWNERS 94

TABLE 22 INNOVATIONS AND PATENT REGISTRATIONS, 2019-2023 94

6.5 TECHNOLOGICAL ROADMAP 97

FIGURE 32 EVOLUTION OF ANTI-AIRCRAFT WARFARE SYSTEMS: ROADMAP FROM 1970 TO PRESENT 97

7 ANTI-AIRCRAFT WARFARE MARKET, BY CAPABILITY 98

7.1 INTRODUCTION 99

FIGURE 33 ATTACK SEGMENT TO GROW AT HIGHEST CAGR DURING FORECAST PERIOD 99

TABLE 23 ANTI-AIRCRAFT WARFARE MARKET, BY CAPABILITY, 2019-2022 (USD MILLION) 99

TABLE 24 ANTI-AIRCRAFT WARFARE MARKET, BY CAPABILITY, 2023-2028 (USD MILLION) 99

7.2 SUPPORT 100

7.3 PROTECTION 100

7.4 ATTACK 100

8 ANTI-AIRCRAFT WARFARE MARKET, BY SYSTEM 101

8.1 INTRODUCTION 102

FIGURE 34 WEAPON SYSTEM SEGMENT TO EXPERIENCE MAXIMUM GROWTH DURING FORECAST PERIOD 102

TABLE 25 ANTI-AIRCRAFT WARFARE MARKET, BY SYSTEM, 2019-2022 (USD MILLION) 102

TABLE 26 ANTI-AIRCRAFT WARFARE MARKET, BY SYSTEM, 2023-2028 (USD MILLION) 102

TABLE 27 ANTI-AIRCRAFT WARFARE MARKET, BY WEAPON SYSTEM, 2019-2022 (USD MILLION) 103

TABLE 28 ANTI-AIRCRAFT WARFARE MARKET, BY WEAPON SYSTEM, 2023-2028 (USD MILLION) 103

8.2 WEAPON SYSTEM 103

8.2.1 ANTI-AIRCRAFT GUN 103

8.2.1.1 Domestic production in emerging economies to drive market 103

8.2.2 ANTI-AIRCRAFT MISSILE 104

8.2.2.1 Integration of anti-air missile systems in warships to drive market 104

8.2.3 OTHERS 104

8.3 RADAR SYSTEM 104

8.3.1 UPGRADE OF NAVAL SHIPS WITH NEW RADARS TO DRIVE MARKET 104

8.4 ELECTRONIC WARFARE SYSTEM 105

8.4.1 PROCUREMENT OF AIRBORNE ELECTRONIC WARFARE SYSTEM TO DRIVE MARKET 105

8.5 COMMAND AND CONTROL SYSTEM 105

8.5.1 MODERNIZATION OF NAVAL COMMAND AND CONTROL SYSTEMS TO DRIVE MARKET 105

8.6 OTHERS 105

**Scotts International. EU Vat number: PL 6772247784**

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

## 9 ANTI-AIRCRAFT WARFARE MARKET, BY PLATFORM 106

### 9.1 INTRODUCTION 107

FIGURE 35 NAVAL SEGMENT TO HOLD DOMINANT MARKET SHARE DURING FORECAST PERIOD 107

TABLE 29 ANTI-AIRCRAFT WARFARE MARKET, BY PLATFORM, 2019-2022 (USD MILLION) 107

TABLE 30 ANTI-AIRCRAFT WARFARE MARKET, BY PLATFORM, 2023-2028 (USD MILLION) 108

### 9.2 LAND 108

TABLE 31 ANTI-AIRCRAFT WARFARE MARKET, BY LAND PLATFORM, 2019-2022 (USD MILLION) 108

TABLE 32 ANTI-AIRCRAFT WARFARE MARKET, BY LAND PLATFORM, 2023-2028 (USD MILLION) 108

#### 9.2.1 VEHICULAR 109

9.2.1.1 Procurement of vehicle-mounted surface-to-air missiles to drive market 109

#### 9.2.2 DISMOUNTED SOLDIERS 109

9.2.2.1 Introduction of MANPADS by countries across the globe to drive market 109

#### 9.2.3 FIXED 109

9.2.3.1 Customizability of fixed air defense systems to drive market 109

### 9.3 NAVAL 110

TABLE 33 ANTI-AIRCRAFT WARFARE MARKET, BY NAVAL PLATFORM, 2019-2022 (USD MILLION) 110

TABLE 34 ANTI-AIRCRAFT WARFARE MARKET, BY NAVAL PLATFORM, 2023-2028 (USD MILLION) 110

#### 9.3.1 NAVAL SHIPS 110

9.3.1.1 Need to protect valuables assets on naval vessels to drive market 110

#### 9.3.2 UNMANNED SURFACE VEHICLES (USVS) 111

9.3.2.1 Ability to provide enhanced maritime security to drive market 111

### 9.4 AIRBORNE 111

TABLE 35 ANTI-AIRCRAFT WARFARE MARKET, BY AIRBORNE PLATFORM, 2019-2022 (USD MILLION) 111

TABLE 36 ANTI-AIRCRAFT WARFARE MARKET, BY AIRBORNE PLATFORM, 2023-2028 (USD MILLION) 111

#### 9.4.1 COMBAT AIRCRAFT 112

9.4.1.1 Critical role played by BVRAAMs in modern aerial combat to drive market 112

#### 9.4.2 MILITARY HELICOPTERS 112

9.4.2.1 Integration of anti-aircraft warfare systems in military helicopters to drive market 112

#### 9.4.3 UNMANNED AERIAL VEHICLES (UAVS) 113

9.4.3.1 Increasing capabilities of naval UAVs to drive market 113

## 10 ANTI-AIRCRAFT WARFARE MARKET, BY RANGE 114

### 10.1 INTRODUCTION 115

FIGURE 36 LONG RANGE SEGMENT TO GROW AT HIGHEST CAGR DURING FORECAST PERIOD 115

TABLE 37 ANTI-AIRCRAFT WARFARE MARKET, BY RANGE, 2019-2022 (USD MILLION) 115

TABLE 38 ANTI-AIRCRAFT WARFARE MARKET, BY RANGE, 2023-2028 (USD MILLION) 115

#### 10.2 SHORT RANGE (<20 KM) 116

#### 10.3 MEDIUM RANGE (20-100 KM) 116

#### 10.4 LONG RANGE (>100 KM) 116

## 11 ANTI-AIRCRAFT WARFARE MARKET, BY REGION 117

### 11.1 INTRODUCTION 118

FIGURE 37 NORTH AMERICA TO LEAD ANTI-AIRCRAFT WARFARE MARKET FROM 2023 TO 2028 118

TABLE 39 ANTI-AIRCRAFT WARFARE MARKET, BY REGION, 2019-2022 (USD MILLION) 118

TABLE 40 ANTI-AIRCRAFT WARFARE MARKET, BY REGION, 2023-2028 (USD MILLION) 119

#### 11.2 NORTH AMERICA 119

##### 11.2.1 PESTLE ANALYSIS 119

FIGURE 38 NORTH AMERICA: ANTI-AIRCRAFT WARFARE MARKET SNAPSHOT 121

TABLE 41 NORTH AMERICA: ANTI-AIRCRAFT WARFARE MARKET, BY COUNTRY, 2019-2022 (USD MILLION) 121

**Scotts International. EU Vat number: PL 6772247784**

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

TABLE 42	NORTH AMERICA: ANTI-AIRCRAFT WARFARE MARKET, BY COUNTRY, 2023-2028 (USD MILLION)	122
TABLE 43	NORTH AMERICA: ANTI-AIRCRAFT WARFARE MARKET, BY CAPABILITY, 2019-2022 (USD MILLION)	122
TABLE 44	NORTH AMERICA: ANTI-AIRCRAFT WARFARE MARKET, BY CAPABILITY, 2023-2028 (USD MILLION)	122
TABLE 45	NORTH AMERICA: ANTI-AIRCRAFT WARFARE MARKET, BY SYSTEM, 2019-2022 (USD MILLION)	122
TABLE 46	NORTH AMERICA: ANTI-AIRCRAFT WARFARE MARKET, BY SYSTEM, 2023-2028 (USD MILLION)	123
TABLE 47	NORTH AMERICA: ANTI-AIRCRAFT WARFARE MARKET, BY WEAPON SYSTEM, 2019-2022 (USD MILLION)	123
TABLE 48	NORTH AMERICA: ANTI-AIRCRAFT WARFARE MARKET, BY WEAPON SYSTEM, 2023-2028 (USD MILLION)	123
TABLE 49	NORTH AMERICA: ANTI-AIRCRAFT WARFARE MARKET, BY PLATFORM, 2019-2022 (USD MILLION)	123
TABLE 50	NORTH AMERICA: ANTI-AIRCRAFT WARFARE MARKET, BY PLATFORM, 2023-2028 (USD MILLION)	124
TABLE 51	NORTH AMERICA: ANTI-AIRCRAFT WARFARE MARKET, BY RANGE, 2019-2022 (USD MILLION)	124
TABLE 52	NORTH AMERICA: ANTI-AIRCRAFT WARFARE MARKET, BY RANGE, 2023-2028 (USD MILLION)	124
11.2.2	US	124
11.2.2.1	Increasing procurement of air defense systems to drive market	124
TABLE 53	US: ANTI-AIRCRAFT WARFARE MARKET, BY SYSTEM, 2019-2022 (USD MILLION)	125
TABLE 54	US: ANTI-AIRCRAFT WARFARE MARKET, BY SYSTEM, 2023-2028 (USD MILLION)	125
TABLE 55	US: ANTI-AIRCRAFT WARFARE MARKET, BY PLATFORM, 2019-2022 (USD MILLION)	125
TABLE 56	US: ANTI-AIRCRAFT WARFARE MARKET, BY PLATFORM, 2023-2028 (USD MILLION)	126
11.2.3	CANADA	126
11.2.3.1	Active support to NATO allies to drive market	126
TABLE 57	CANADA: ANTI-AIRCRAFT WARFARE MARKET, BY SYSTEM, 2019-2022 (USD MILLION)	126
TABLE 58	CANADA: ANTI-AIRCRAFT WARFARE MARKET, BY SYSTEM, 2023-2028 (USD MILLION)	126
TABLE 59	CANADA: ANTI-AIRCRAFT WARFARE MARKET, BY PLATFORM, 2019-2022 (USD MILLION)	127
TABLE 60	CANADA: ANTI-AIRCRAFT WARFARE MARKET, BY PLATFORM, 2023-2028 (USD MILLION)	127
11.3	EUROPE	127
11.3.1	PESTLE ANALYSIS	127
FIGURE 39	EUROPE: ANTI-AIRCRAFT WARFARE MARKET SNAPSHOT	129
TABLE 61	EUROPE: ANTI-AIRCRAFT WARFARE MARKET, BY COUNTRY, 2019-2022 (USD MILLION)	130
TABLE 62	EUROPE: ANTI-AIRCRAFT WARFARE MARKET, BY COUNTRY, 2023-2028 (USD MILLION)	130
TABLE 63	EUROPE: ANTI-AIRCRAFT WARFARE MARKET, BY CAPABILITY, 2019-2022 (USD MILLION)	130
TABLE 64	EUROPE: ANTI-AIRCRAFT WARFARE MARKET, BY CAPABILITY, 2023-2028 (USD MILLION)	130
TABLE 65	EUROPE: ANTI-AIRCRAFT WARFARE MARKET, BY SYSTEM, 2019-2022 (USD MILLION)	131
TABLE 66	EUROPE: ANTI-AIRCRAFT WARFARE MARKET, BY SYSTEM, 2023-2028 (USD MILLION)	131
TABLE 67	EUROPE: ANTI-AIRCRAFT WARFARE MARKET, BY WEAPON SYSTEM, 2019-2022 (USD MILLION)	131
TABLE 68	EUROPE: ANTI-AIRCRAFT WARFARE MARKET, BY WEAPON SYSTEM, 2023-2028 (USD MILLION)	131
TABLE 69	EUROPE: ANTI-AIRCRAFT WARFARE MARKET, BY PLATFORM, 2019-2022 (USD MILLION)	132
TABLE 70	EUROPE: ANTI-AIRCRAFT WARFARE MARKET, BY PLATFORM, 2023-2028 (USD MILLION)	132
TABLE 71	EUROPE: ANTI-AIRCRAFT WARFARE MARKET, BY RANGE, 2019-2022 (USD MILLION)	132
TABLE 72	EUROPE: ANTI-AIRCRAFT WARFARE MARKET, BY RANGE, 2023-2028 (USD MILLION)	132
11.3.2	UK	133
11.3.2.1	Collaborations with global aerospace & defense industry players to drive market	133
TABLE 73	UK: ANTI-AIRCRAFT WARFARE MARKET, BY SYSTEM, 2019-2022 (USD MILLION)	133
TABLE 74	UK: ANTI-AIRCRAFT WARFARE MARKET, BY SYSTEM, 2023-2028 (USD MILLION)	133
TABLE 75	UK: ANTI-AIRCRAFT WARFARE MARKET, BY PLATFORM, 2019-2022 (USD MILLION)	133
TABLE 76	UK: ANTI-AIRCRAFT WARFARE MARKET, BY PLATFORM, 2023-2028 (USD MILLION)	134
11.3.3	FRANCE	134
11.3.3.1	Deals provided by European cooperation to drive market	134
TABLE 77	FRANCE: ANTI-AIRCRAFT WARFARE MARKET, BY SYSTEM, 2019-2022 (USD MILLION)	134



TABLE 78	FRANCE: ANTI-AIRCRAFT WARFARE MARKET, BY SYSTEM, 2023-2028 (USD MILLION)	135
TABLE 79	FRANCE: ANTI-AIRCRAFT WARFARE MARKET, BY PLATFORM, 2019-2022 (USD MILLION)	135
TABLE 80	FRANCE: ANTI-AIRCRAFT WARFARE MARKET, BY PLATFORM, 2023-2028 (USD MILLION)	135
11.3.4	GERMANY	135
11.3.4.1	Growing demand for air defense systems to drive market	135
TABLE 81	GERMANY: ANTI-AIRCRAFT WARFARE MARKET, BY SYSTEM, 2019-2022 (USD MILLION)	136
TABLE 82	GERMANY: ANTI-AIRCRAFT WARFARE MARKET, BY SYSTEM, 2023-2028 (USD MILLION)	136
TABLE 83	GERMANY: ANTI-AIRCRAFT WARFARE MARKET, BY PLATFORM, 2019-2022 (USD MILLION)	136
TABLE 84	GERMANY: ANTI-AIRCRAFT WARFARE MARKET, BY PLATFORM, 2023-2028 (USD MILLION)	136
11.3.5	ITALY	137
11.3.5.1	Commitment to global security efforts to drive market	137
TABLE 85	ITALY: ANTI-AIRCRAFT WARFARE MARKET, BY SYSTEM, 2019-2022 (USD MILLION)	137
TABLE 86	ITALY: ANTI-AIRCRAFT WARFARE MARKET, BY SYSTEM, 2023-2028 (USD MILLION)	137
TABLE 87	ITALY: ANTI-AIRCRAFT WARFARE MARKET, BY PLATFORM, 2019-2022 (USD MILLION)	138
TABLE 88	ITALY: ANTI-AIRCRAFT WARFARE MARKET, BY PLATFORM, 2023-2028 (USD MILLION)	138
11.3.6	RUSSIA	138
11.3.6.1	Growing threats from NATO countries to drive market	138
TABLE 89	RUSSIA: ANTI-AIRCRAFT WARFARE MARKET, BY SYSTEM, 2019-2022 (USD MILLION)	139
TABLE 90	RUSSIA: ANTI-AIRCRAFT WARFARE MARKET, BY SYSTEM, 2023-2028 (USD MILLION)	139
TABLE 91	RUSSIA: ANTI-AIRCRAFT WARFARE MARKET, BY PLATFORM, 2019-2022 (USD MILLION)	139
TABLE 92	RUSSIA: ANTI-AIRCRAFT WARFARE MARKET, BY PLATFORM, 2023-2028 (USD MILLION)	139
11.3.7	REST OF EUROPE	140
TABLE 93	REST OF EUROPE: ANTI-AIRCRAFT WARFARE MARKET, BY SYSTEM, 2019-2022 (USD MILLION)	140
TABLE 94	REST OF EUROPE: ANTI-AIRCRAFT WARFARE MARKET, BY SYSTEM, 2023-2028 (USD MILLION)	141
TABLE 95	REST OF EUROPE: ANTI-AIRCRAFT WARFARE MARKET, BY PLATFORM, 2019-2022 (USD MILLION)	141
TABLE 96	REST OF EUROPE: ANTI-AIRCRAFT WARFARE MARKET, BY PLATFORM, 2023-2028 (USD MILLION)	141
11.4	ASIA PACIFIC	142
11.4.1	PESTLE ANALYSIS	142
FIGURE 40	ASIA PACIFIC: ANTI-AIRCRAFT WARFARE MARKET SNAPSHOT	144
TABLE 97	ASIA PACIFIC: ANTI-AIRCRAFT WARFARE MARKET, BY COUNTRY, 2019-2022 (USD MILLION)	145
TABLE 98	ASIA PACIFIC: ANTI-AIRCRAFT WARFARE MARKET, BY COUNTRY, 2023-2028 (USD MILLION)	145
TABLE 99	ASIA PACIFIC: ANTI-AIRCRAFT WARFARE MARKET, BY CAPABILITY, 2019-2022 (USD MILLION)	145
TABLE 100	ASIA PACIFIC: ANTI-AIRCRAFT WARFARE MARKET, BY CAPABILITY, 2023-2028 (USD MILLION)	146
TABLE 101	ASIA PACIFIC: ANTI-AIRCRAFT WARFARE MARKET, BY SYSTEM, 2019-2022 (USD MILLION)	146
TABLE 102	ASIA PACIFIC: ANTI-AIRCRAFT WARFARE MARKET, BY SYSTEM, 2023-2028 (USD MILLION)	146
TABLE 103	ASIA PACIFIC: ANTI-AIRCRAFT WARFARE MARKET, BY WEAPON SYSTEM, 2019-2022 (USD MILLION)	147
TABLE 104	ASIA PACIFIC: ANTI-AIRCRAFT WARFARE MARKET, BY WEAPON SYSTEM, 2023-2028 (USD MILLION)	147
TABLE 105	ASIA PACIFIC: ANTI-AIRCRAFT WARFARE MARKET, BY PLATFORM, 2019-2022 (USD MILLION)	147
TABLE 106	ASIA PACIFIC: ANTI-AIRCRAFT WARFARE MARKET, BY PLATFORM, 2023-2028 (USD MILLION)	147
TABLE 107	ASIA PACIFIC: ANTI-AIRCRAFT WARFARE MARKET, BY RANGE, 2019-2022 (USD MILLION)	148
TABLE 108	ASIA PACIFIC: ANTI-AIRCRAFT WARFARE MARKET, BY RANGE, 2023-2028 (USD MILLION)	148
11.4.2	CHINA	148
11.4.2.1	New surveillance & guidance systems to drive market	148
TABLE 109	CHINA: ANTI-AIRCRAFT WARFARE MARKET, BY SYSTEM, 2019-2022 (USD MILLION)	148
TABLE 110	CHINA: ANTI-AIRCRAFT WARFARE MARKET, BY SYSTEM, 2023-2028 (USD MILLION)	149
TABLE 111	CHINA: ANTI-AIRCRAFT WARFARE MARKET, BY PLATFORM, 2019-2022 (USD MILLION)	149
TABLE 112	CHINA: ANTI-AIRCRAFT WARFARE MARKET, BY PLATFORM, 2023-2028 (USD MILLION)	149

**Scotts International. EU Vat number: PL 6772247784**

tel. 0048 603 394 346 e-mail: [support@scotts-international.com](mailto:support@scotts-international.com)

[www.scotts-international.com](http://www.scotts-international.com)

#### 11.4.3 INDIA 149

11.4.3.1 Development and procurement of surface-to-air missiles and counter-drone systems to drive market 149

TABLE 113 INDIA: ANTI-AIRCRAFT WARFARE MARKET, BY SYSTEM, 2019-2022 (USD MILLION) 150

TABLE 114 INDIA: ANTI-AIRCRAFT WARFARE MARKET, BY SYSTEM, 2023-2028 (USD MILLION) 150

TABLE 115 INDIA: ANTI-AIRCRAFT WARFARE MARKET, BY PLATFORM, 2019-2022 (USD MILLION) 150

TABLE 116 INDIA: ANTI-AIRCRAFT WARFARE MARKET, BY PLATFORM, 2023-2028 (USD MILLION) 151

#### 11.4.4 JAPAN 151

11.4.4.1 Development of anti-aircraft missiles and C-UAVs to drive market 151

TABLE 117 JAPAN: ANTI-AIRCRAFT WARFARE MARKET, BY SYSTEM, 2019-2022 (USD MILLION) 151

TABLE 118 JAPAN: ANTI-AIRCRAFT WARFARE MARKET, BY SYSTEM, 2023-2028 (USD MILLION) 152

TABLE 119 JAPAN: ANTI-AIRCRAFT WARFARE MARKET, BY PLATFORM, 2019-2022 (USD MILLION) 152

TABLE 120 JAPAN: ANTI-AIRCRAFT WARFARE MARKET, BY PLATFORM, 2023-2028 (USD MILLION) 152

#### 11.4.5 SOUTH KOREA 152

11.4.5.1 Procurement of anti-aircraft missiles and anti-aircraft gun upgrades to drive market 152

TABLE 121 SOUTH KOREA: ANTI-AIRCRAFT WARFARE MARKET, BY SYSTEM, 2019-2022 (USD MILLION) 153

TABLE 122 SOUTH KOREA: ANTI-AIRCRAFT WARFARE MARKET, BY SYSTEM, 2023-2028 (USD MILLION) 153

TABLE 123 SOUTH KOREA: ANTI-AIRCRAFT WARFARE MARKET, BY PLATFORM, 2019-2022 (USD MILLION) 153

TABLE 124 SOUTH KOREA: ANTI-AIRCRAFT WARFARE MARKET, BY PLATFORM, 2023-2028 (USD MILLION) 154

#### 11.4.6 AUSTRALIA 154

11.4.6.1 Increasing investments in naval long-range capabilities to drive market 154

TABLE 125 AUSTRALIA: ANTI-AIRCRAFT WARFARE MARKET, BY SYSTEM, 2019-2022 (USD MILLION) 154

TABLE 126 AUSTRALIA: ANTI-AIRCRAFT WARFARE MARKET, BY SYSTEM, 2023-2028 (USD MILLION) 155

TABLE 127 AUSTRALIA: ANTI-AIRCRAFT WARFARE MARKET, BY PLATFORM, 2019-2022 (USD MILLION) 155

TABLE 128 AUSTRALIA: ANTI-AIRCRAFT WARFARE MARKET, BY PLATFORM, 2023-2028 (USD MILLION) 155

#### 11.4.7 REST OF ASIA PACIFIC 155

TABLE 129 REST OF ASIA PACIFIC: ANTI-AIRCRAFT WARFARE MARKET, BY SYSTEM, 2019-2022 (USD MILLION) 156

TABLE 130 REST OF ASIA PACIFIC: ANTI-AIRCRAFT WARFARE MARKET, BY SYSTEM, 2023-2028 (USD MILLION) 157

TABLE 131 REST OF ASIA PACIFIC: ANTI-AIRCRAFT WARFARE MARKET, BY PLATFORM, 2019-2022 (USD MILLION) 157

TABLE 132 REST OF ASIA PACIFIC: ANTI-AIRCRAFT WARFARE MARKET, BY PLATFORM, 2023-2028 (USD MILLION) 157

#### 11.5 MIDDLE EAST 158

##### 11.5.1 PESTLE ANALYSIS 158

FIGURE 41 MIDDLE EAST: ANTI-AIRCRAFT WARFARE MARKET SNAPSHOT 159

TABLE 133 MIDDLE EAST: ANTI-AIRCRAFT WARFARE MARKET, BY COUNTRY/REGION, 2019-2022 (USD MILLION) 160

TABLE 134 MIDDLE EAST: ANTI-AIRCRAFT WARFARE MARKET, BY COUNTRY/REGION, 2023-2028 (USD MILLION) 160

TABLE 135 MIDDLE EAST: ANTI-AIRCRAFT WARFARE MARKET, BY CAPABILITY, 2019-2022 (USD MILLION) 160

TABLE 136 MIDDLE EAST: ANTI-AIRCRAFT WARFARE MARKET, BY CAPABILITY, 2023-2028 (USD MILLION) 160

TABLE 137 MIDDLE EAST: ANTI-AIRCRAFT WARFARE MARKET, BY SYSTEM, 2019-2022 (USD MILLION) 161

TABLE 138 MIDDLE EAST: ANTI-AIRCRAFT WARFARE MARKET, BY SYSTEM, 2023-2028 (USD MILLION) 161

TABLE 139 MIDDLE EAST: ANTI-AIRCRAFT WARFARE MARKET, BY WEAPON SYSTEM, 2019-2022 (USD MILLION) 161

TABLE 140 MIDDLE EAST: ANTI-AIRCRAFT WARFARE MARKET, BY WEAPON SYSTEM, 2023-2028 (USD MILLION) 162

TABLE 141 MIDDLE EAST: ANTI-AIRCRAFT WARFARE MARKET, BY PLATFORM, 2019-2022 (USD MILLION) 162

TABLE 142 MIDDLE EAST: ANTI-AIRCRAFT WARFARE MARKET, BY PLATFORM, 2023-2028 (USD MILLION) 162

TABLE 143 MIDDLE EAST: ANTI-AIRCRAFT WARFARE MARKET, BY RANGE, 2019-2022 (USD MILLION) 162

TABLE 144 MIDDLE EAST: ANTI-AIRCRAFT WARFARE MARKET, BY RANGE, 2023-2028 (USD MILLION) 163

##### 11.5.2 GCC 163

TABLE 145 GCC: ANTI-AIRCRAFT WARFARE MARKET, BY SYSTEM, 2019-2022 (USD MILLION) 163

TABLE 146 GCC: ANTI-AIRCRAFT WARFARE MARKET, BY SYSTEM, 2023-2028 (USD MILLION) 163

**Scotts International. EU Vat number: PL 6772247784**

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

TABLE 147GCC: ANTI-AIRCRAFT WARFARE MARKET, BY PLATFORM, 2019-2022 (USD MILLION)	164
TABLE 148GCC: ANTI-AIRCRAFT WARFARE MARKET, BY PLATFORM, 2023-2028 (USD MILLION)	164
11.5.2.1Saudi Arabia	164
11.5.2.1.1Substantial investment in defense industry to drive market	164
TABLE 149SAUDI ARABIA: ANTI-AIRCRAFT WARFARE MARKET, BY SYSTEM, 2019-2022 (USD MILLION)	164
TABLE 150SAUDI ARABIA: ANTI-AIRCRAFT WARFARE MARKET, BY SYSTEM, 2023-2028 (USD MILLION)	165
TABLE 151SAUDI ARABIA: ANTI-AIRCRAFT WARFARE MARKET, BY PLATFORM, 2019-2022 (USD MILLION)	165
TABLE 152SAUDI ARABIA: ANTI-AIRCRAFT WARFARE MARKET, BY PLATFORM, 2023-2028 (USD MILLION)	165
11.5.2.2UAE	166
11.5.2.2.1Expansion of navy's anti-aircraft infrastructure for strategic and commercial ambitions to drive market	166
TABLE 153UAE: ANTI-AIRCRAFT WARFARE MARKET, BY SYSTEM, 2019-2022 (USD MILLION)	166
TABLE 154UAE: ANTI-AIRCRAFT WARFARE MARKET, BY SYSTEM, 2023-2028 (USD MILLION)	166
TABLE 155UAE: ANTI-AIRCRAFT WARFARE MARKET, BY PLATFORM, 2019-2022 (USD MILLION)	166
TABLE 156UAE: ANTI-AIRCRAFT WARFARE MARKET, BY PLATFORM, 2023-2028 (USD MILLION)	167
11.5.2.3Qatar	167
11.5.2.3.1Significant naval expansion to drive market	167
TABLE 157QATAR: ANTI-AIRCRAFT WARFARE MARKET, BY SYSTEM, 2019-2022 (USD MILLION)	167
TABLE 158QATAR: ANTI-AIRCRAFT WARFARE MARKET, BY SYSTEM, 2023-2028 (USD MILLION)	167
TABLE 159QATAR: ANTI-AIRCRAFT WARFARE MARKET, BY PLATFORM, 2019-2022 (USD MILLION)	168
TABLE 160QATAR: ANTI-AIRCRAFT WARFARE MARKET, BY PLATFORM, 2023-2028 (USD MILLION)	168
11.5.3REST OF MIDDLE EAST	168
TABLE 161REST OF MIDDLE EAST: ANTI-AIRCRAFT WARFARE MARKET, BY SYSTEM, 2019-2022 (USD MILLION)	169
TABLE 162REST OF MIDDLE EAST: ANTI-AIRCRAFT WARFARE MARKET, BY SYSTEM, 2023-2028 (USD MILLION)	169
TABLE 163REST OF MIDDLE EAST: ANTI-AIRCRAFT WARFARE MARKET, BY PLATFORM, 2019-2022 (USD MILLION)	169
TABLE 164REST OF MIDDLE EAST: ANTI-AIRCRAFT WARFARE MARKET, BY PLATFORM, 2023-2028 (USD MILLION)	170
11.6REST OF THE WORLD (ROW)	170
11.6.1PESTLE ANALYSIS	170
TABLE 165REST OF THE WORLD: ANTI-AIRCRAFT WARFARE MARKET, BY REGION, 2019-2022 (USD MILLION)	171
TABLE 166REST OF THE WORLD: ANTI-AIRCRAFT WARFARE MARKET, BY REGION, 2023-2028 (USD MILLION)	171
TABLE 167REST OF THE WORLD: ANTI-AIRCRAFT WARFARE MARKET, BY CAPABILITY, 2019-2022 (USD MILLION)	171
TABLE 168REST OF THE WORLD: ANTI-AIRCRAFT WARFARE MARKET, BY CAPABILITY, 2023-2028 (USD MILLION)	171
TABLE 169REST OF THE WORLD: ANTI-AIRCRAFT WARFARE MARKET, BY SYSTEM, 2019-2022 (USD MILLION)	172
TABLE 170REST OF THE WORLD: ANTI-AIRCRAFT WARFARE MARKET, BY SYSTEM, 2023-2028 (USD MILLION)	172
TABLE 171REST OF THE WORLD: ANTI-AIRCRAFT WARFARE MARKET, BY WEAPON SYSTEM, 2019-2022 (USD MILLION)	172
TABLE 172REST OF THE WORLD: ANTI-AIRCRAFT WARFARE MARKET, BY WEAPON SYSTEM, 2023-2028 (USD MILLION)	173
TABLE 173REST OF THE WORLD: ANTI-AIRCRAFT WARFARE MARKET, BY PLATFORM, 2019-2022 (USD MILLION)	173
TABLE 174REST OF THE WORLD: ANTI-AIRCRAFT WARFARE MARKET, BY PLATFORM, 2023-2028 (USD MILLION)	173
TABLE 175REST OF THE WORLD: ANTI-AIRCRAFT WARFARE MARKET, BY RANGE, 2019-2022 (USD MILLION)	173
TABLE 176REST OF THE WORLD: ANTI-AIRCRAFT WARFARE MARKET, BY RANGE, 2023-2028 (USD MILLION)	174
11.6.2LATIN AMERICA	174
11.6.2.1Growing procurement of naval ships to drive market	174
TABLE 177LATIN AMERICA: ANTI-AIRCRAFT WARFARE MARKET, BY SYSTEM, 2019-2022 (USD MILLION)	175
TABLE 178LATIN AMERICA: ANTI-AIRCRAFT WARFARE MARKET, BY SYSTEM, 2023-2028 (USD MILLION)	175
TABLE 179LATIN AMERICA: ANTI-AIRCRAFT WARFARE MARKET, BY PLATFORM, 2019-2022 (USD MILLION)	175
TABLE 180LATIN AMERICA: ANTI-AIRCRAFT WARFARE MARKET, BY PLATFORM, 2023-2028 (USD MILLION)	176
11.6.3AFRICA	176
11.6.3.1Adoption of advanced technologies in anti-aircraft warfare systems to drive market	176

TABLE 181	AFRICA: ANTI-AIRCRAFT WARFARE MARKET, BY SYSTEM, 2019-2022 (USD MILLION)	176
TABLE 182	AFRICA: ANTI-AIRCRAFT WARFARE MARKET, BY SYSTEM, 2023-2028 (USD MILLION)	177
TABLE 183	AFRICA: ANTI-AIRCRAFT WARFARE MARKET, BY PLATFORM, 2019-2022 (USD MILLION)	177
TABLE 184	AFRICA: ANTI-AIRCRAFT WARFARE MARKET, BY PLATFORM, 2023-2028 (USD MILLION)	177
12	COMPETITIVE LANDSCAPE	178
12.1	INTRODUCTION	178
12.2	KEY PLAYERS' STRATEGIES/RIGHT TO WIN	178
TABLE 185	STRATEGIES ADOPTED BY KEY PLAYERS IN ANTI-AIRCRAFT WARFARE MARKET	178
12.3	MARKET RANKING OF KEY PLAYERS, 2022	180
FIGURE 42	RANKING OF KEY PLAYERS IN ANTI-AIRCRAFT WARFARE MARKET, 2022	180
12.4	MARKET SHARE ANALYSIS OF KEY PLAYERS, 2022	180
FIGURE 43	MARKET SHARE ANALYSIS OF KEY PLAYERS, 2022	180
TABLE 186	ANTI-AIRCRAFT WARFARE MARKET: DEGREE OF COMPETITION	181
12.5	REVENUE ANALYSIS OF TOP 5 MARKET PLAYERS, 2018-2022	183
FIGURE 44	REVENUE ANALYSIS OF TOP 5 PLAYERS IN ANTI-AIRCRAFT WARFARE MARKET, 2018-2022	183
12.6	COMPANY EVALUATION MATRIX	184
12.6.1	STARS	184
12.6.2	EMERGING LEADERS	184
12.6.3	PERVASIVE PLAYERS	184
12.6.4	PARTICIPANTS	184
FIGURE 45	COMPANY EVALUATION MATRIX, 2022	185
12.6.5	COMPANY FOOTPRINT	186
FIGURE 46	COMPANY FOOTPRINT	186
TABLE 187	COMPANY SYSTEM FOOTPRINT	187
TABLE 188	COMPANY PLATFORM FOOTPRINT	188
TABLE 189	COMPANY REGION FOOTPRINT	189
12.7	COMPETITIVE SCENARIO	190
12.7.1	MARKET EVALUATION FRAMEWORK	190
12.7.2	PRODUCT LAUNCHES	190
TABLE 190	PRODUCT LAUNCHES, 2023	190
12.7.3	RECENT DEVELOPMENTS	191
TABLE 191	RECENT DEVELOPMENTS, 2021-2023	191
12.7.4	DEALS	192
TABLE 192	DEALS, 2019-2023	192

**Anti-aircraft Warfare Market by Capability (Support, Protection and Attack), System (Weapon System, Radar System, Electronic Warfare System, Command and Control System), Platform (Land , Naval and Airborne), Range & Region - Forecast to 2028**

Market Report | 2023-11-21 | 272 pages | MarketsandMarkets

To place an Order with Scotts International:

- ☐ - Print this form
- ☐ - Complete the relevant blank fields and sign
- ☐ - Send as a scanned email to support@scotts-international.com

**ORDER FORM:**

Select license	License	Price
	Single User	\$4950.00
	Multi User	\$6650.00
	Corporate License	\$8150.00
	Enterprise Site License	\$10000.00
		VAT
		Total

\*Please circle the relevant license option. For any questions please contact support@scotts-international.com or 0048 603 394 346.

\*\* VAT will be added at 23% for Polish based companies, individuals and EU based companies who are unable to provide a valid EU Vat Numbers.

Email*	<input type="text"/>	Phone*	<input type="text"/>
First Name*	<input type="text"/>	Last Name*	<input type="text"/>
Job title*	<input type="text"/>		
Company Name*	<input type="text"/>	EU Vat / Tax ID / NIP number*	<input type="text"/>
Address*	<input type="text"/>	City*	<input type="text"/>
Zip Code*	<input type="text"/>	Country*	<input type="text"/>

**Scotts International. EU Vat number: PL 6772247784**

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

Date

2025-06-25

Signature

**Scotts International. EU Vat number: PL 6772247784**

tel. 0048 603 394 346 e-mail: [support@scotts-international.com](mailto:support@scotts-international.com)

[www.scotts-international.com](http://www.scotts-international.com)