

America Intelligence, Surveillance, And Reconnaissance - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts (2024 - 2029)

Market Report | 2024-02-17 | 85 pages | Mordor Intelligence

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Report description:

The America Intelligence, Surveillance, And Reconnaissance Market size is estimated at USD 4.94 billion in 2024, and is expected to reach USD 5.53 billion by 2029, growing at a CAGR of 2.29% during the forecast period (2024-2029).

The increasing demand for intelligence, surveillance, and reconnaissance solutions across land and sea borders of the countries in North America and Latin America is expected to drive the growth of the market studied during the forecast period. The integration of intelligence-gathering sensors into the ISR systems with enhanced surveillance range and capabilities for better situational awareness of military personnel is expected to propel the growth of the ISR market in the region.

The increasing focus on miniaturization and improving the accuracy of the ISR systems and payloads are propelling their utilization across all platforms. Their high reliability and availability at low costs have propelled militaries to procure these systems in abundance. As a new line of threats emerges, these systems have become integral to military preparedness due to their utility.

Rapid technological developments are breeding disruptive technologies in the defense industry. The current focus is on incorporating AI and machine learning technologies into the ISR platforms. Militaries are also focusing on shifting toward open architecture ISR systems. The growing demand for unmanned systems and systems with autonomous capabilities is expected to propel the market studied in the coming years.

While the adoption of a variety of C4ISR systems is increasing, it is presenting a host of challenges for end users, thereby putting pressure on manufacturers to help them overcome the challenges. Although technological advancements in the C4ISR industry are growing at unprecedented rates, the increasing amount of generated data is presenting a host of challenges for the militaries and the players in the industry.

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America Intelligence, Surveillance, And Reconnaissance Market Trends

The Sea Segment is Expected Witness Significant Growth During the Forecast Period

The sea segment of the market studied is expected to witness growth during the forecast period owing to the increasing investments toward enhancing the capabilities of maritime surveillance. The procurement of patrol vessels and USVs, as well as the modernization of existing enemy detection and threat-warning systems with advanced, newer-generation systems onboard naval vessels, is anticipated to drive the growth of the segment.

In April 2022, the Brazilian Navy accepted the delivery of its last A-4 Skyhawk, modernized by Embraer. The Brazilian Navy's modernized aircraft got new power generation, navigation, weapons, tactical communication, computers, sensor systems, state-of-the-art multi-mode radar, and the latest operating system.

Currently, the US Navy is looking for a common combat system connecting ships in the future. With this development, the US Navy could achieve a common combat system for all its surface combatants, field and integrate new capabilities across the entire fleet faster, and manage the combat system for less cost. The US Navy has implemented measures in this dimension. For instance, in September 2023, the US Navy awarded Lockheed Martin USD 23 million to begin creating the Integrated Combat System that can connect the US Navy's and US Coast Guard's surface fleets. The award can be extended up to USD 1.1 billion if all options are exercised through fiscal 2030. Such factors are expected to accelerate the growth of the sea segment of the market studied during the forecast period.

North America to Continue its Dominance During the Forecast Period

The North American region currently dominates the market and is expected to continue its domination during the forecast period. This is mainly due to the procurement of various land, air, sea, and space ISR systems by the US and Canadian governments.

In March 2022, the Canadian Department of National Defense selected Elbit Systems UK to provide a TORCH-X-based solution as part of the Airspace Coordination Centre Modernization (ASCCM) Project. Under the project, Elbit Systems UK will supply a joint-air version of its TORCH-X-based Battle Management Application (BMA) that will provide situational awareness by constantly displaying a local or recognized air picture, thus enabling effective coordination of air assets into complex land and joint battlespace. The system will be operated utilizing Elbit Systems' E-CIXTM open architecture framework that will enable connectivity to the Canadian Armed Forces' legacy applications and tactical datalinks while allowing future integration of new applications in support of the Canadian Armed Forces digital transformation plan. The solution to be supplied will be provided to the Canadian Military Headquarters for both Land and Joint Command to support air missions and joint-task force operations.

For FY 2023, the US Pentagon allocated USD 12.7 billion for command, control, communications, computers, and intelligence systems. The US armed forces are modernizing their special mission aircraft fleet, Electronic Warfare aircraft (EC-37B), Battlefield Airborne Communications Node aircraft (E-11A), and Maritime Patrol Aircraft (P-8A) on order. Between 2022 and 2029, a total of 12 P-8A and 5 E-11A are expected to be delivered. Such investments in the development of advanced communication and situational awareness systems are expected to accelerate the growth of the market studied.

America Intelligence, Surveillance, And Reconnaissance Industry Overview

The American intelligence, surveillance, and reconnaissance market is semi-consolidated in nature. Some of the prominent players in the market are L3Harris Technologies Inc., General Dynamics Corporation, The Boeing Company, RTX Corporation, and Lockheed Martin Corporation. With the presence of a wide range of products like maritime patrol aircraft, patrol vessels, radars,

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unmanned aerial vehicles (UAVs), and USVs, among others, companies are increasing their share in the market studied with the sales of various ISR platforms to the armed forces.

The innovation of new and advanced C4ISR systems is the major strategy of the players to increase their share in the market. Long-term contracts of the companies to support the US DoD across land, air, and sea platforms are expected to help them increase their share in the market in the coming years. The competition in the market is expected to increase with companies increasing their investments in the development of new products to support the ISR missions of the armed forces in the regions.

Additional Benefits:

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

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