

C4ISR - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts 2019 - 2029

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Report description:

The C4ISR Market size is estimated at USD 13.04 billion in 2024, and is expected to reach USD 15.15 billion by 2029, growing at a CAGR of 3.03% during the forecast period (2024-2029).

Despite the COVID-19 pandemic hitting the global economy severely, the impact of the same is not felt on the global military expenditure, which continued to increase in 2020 and 2021. According to the Stockholm International Peace Research Institute (SIPRI), the global military expenditure reached a total of USD 2.113 trillion in 2021, increasing by about 0.7% compared to 2020. Such high expenditure indicates the negligible impact the COVID-19 pandemic had on defense systems development and procurements. The growth in military spending is expected to drive the prospects of the market into focus.

On the other hand, the factors like growing terrorism, threats from adversaries, and increasing global territorial tensions around the world, are propelling the militaries to enhance their battlefield data-sharing capabilities. The growing demand for asymmetric warfare, along with increasing demand for advanced technologies like network-centric battle management and unmanned vehicles, is expected to accelerate the market growth during the forecast period.

There is a growing emphasis on increasing investments toward integrating advanced technologies like machine learning and artificial intelligence into C4ISR solutions to enhance military personnel's efficiency and situational awareness. This is also expected to propel market growth in the coming years.

C4ISR Market Trends

Increasing Investments to Enhance the Space-based C4ISR Capabilities

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With the emergence of several space-based systems that can replace the traditional C4ISR architecture, several countries are allocating certain expenditures to such programs in the defense spending plans. Space-based C4ISR capabilities have become important for the global armed forces, as they offer a technological edge over adversaries. The advent of small satellites that offer the same performance as traditional satellites while contributing to cost savings is driving investments into space-based C4ISR systems. The US government plans to invest in developing small satellite constellations in low-earth orbit (LEO) to obtain enhanced space-based situational awareness capabilities. These investments aim to overcome the shortcomings of traditional large satellite and airborne sensors that cannot provide continuous surveillance. In April 2022, SpaceX launched a clandestine spy satellite for the US National Reconnaissance Office (NRO). The NRO operates the US fleet of spy satellites. The Pentagon's Space Development Agency is especially interested in lightweight laser communications terminals for the fleet of LEO satellites it plans to deploy over the next few years. Also, the advent of pseudo-high-altitude satellites (HAPS), which incorporates the best aspects of terrestrial and satellite-based communication systems, bridged the gap between drones and satellites in terms of coverage and cost. In February 2021, India's Hindustan Aeronautics Limited (HAL) announced that it is developing a futuristic high-altitude pseudo satellite with a local start-up company to enhance the C4ISR capabilities of the Indian armed forces. Such developments are expected to augment the prospects of the Space-based C4ISR segment during the forecast period.

North America Held the Largest Market Share in 2021

North America will have the highest market share among all the regions in 2021 due to the huge emphasis of the US armed forces on enhancing their C4ISR capabilities. The United States is the largest military spender in the world. In 2021, the US defense spending crossed the 800 billion mark for the first time in its history to reach USD 801 billion. It accounted for 38% of the global total military spending., according to SIPRI. The US armed forces plan to enhance their C4ISR capabilities to obtain a decisive advantage over their adversaries amidst the ongoing race for technological superiority. Hence, the country is investing huge amounts into developing advanced C4ISR solutions, which has become one of the key priorities of the warfare strategy of the United States. The US government is also focusing on the expansion and modernization of the existing fleet of land, air, and sea platforms with advanced communication and situational awareness systems. For instance, as of December 2021, the United States Northern Command and the Space Force marked the completion of construction on the long-range discrimination radar site at Clear Space Force Station, Alaska. The new radar is designed to track incoming ballistic missiles better.

Similarly, Canada plans to invest significantly in procuring battlespace situational awareness tools, navigation systems, and portable communications systems, among others, in the coming years. For instance, in April 2022, Canada announced its plans to invest CAD 1 Billion to build a radar system in Southern Canada. The system would watch the Arctic airspace to detect threats against the major United States and Canadian cities. Such modernization plans to enhance the armed forces' capabilities in the region are expected to propel the market's growth during the forecast period.

C4ISR Industry Overview

The C4ISR market is fragmented, with many international and regional players supporting the armed forces worldwide. Some of the prominent players in the C4ISR market are Northrop Grumman Corporation, Raytheon Technologies Corporation, L3Harris Technologies Inc, Thales Group, and General Dynamics Corporation. The companies are formulating new strategies to expand their presence in various regions and capture new contracts from the armed forces. The market players are actively forming JVs and partnerships with local manufacturers to expand their presence in other regions. In addition to such plans, investments into R&D for developing C4ISR systems that are integrated with technologies like AI and quantum networking are also anticipated to help the companies attract new customers and increase their share in the market in the coming years.

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