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

Market Report | 2024-02-17 | 105 pages | Mordor Intelligence

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Report description:

The Land Based C4ISR Market size is estimated at USD 3.75 billion in 2024, and is expected to reach USD 4.22 billion by 2029, growing at a CAGR of 2.39% during the forecast period (2024-2029).

The COVID-19 pandemic had a minor negative impact on the global land-based C4ISR market because it caused production to decline as a result of imposed restrictions and temporary cost increases for some crucial parts and components of C4ISR systems. However, a steadily growing defense expenditure fostered the adoption of advanced C4ISR systems, which was the primary market driver. On this note, the global defense expenditure crossed USD 2 trillion in 2021.

The rise of geopolitical tensions and extremist activities led to the introduction of C4ISR systems, as defense forces around the world looked for ways to adopt integrated solutions that would make it easier for military assets to work together and improve their ability to fight asymmetric wars. Initiatives to develop geospatial intelligence, unmanned ground vehicles (UGVs), land-based C2, and ISR systems to improve the situational awareness of deployed forces and gain a tactical advantage on the battlefield are driving the rapid growth in the demand for C4ISR systems. The rapid modernization of threat detection systems, along with the race to gain information firsthand, has exponentially driven the demand for C4ISR systems across multiple geographies around the world.

Land Based C4ISR Market Trends

C4 Systems Are Anticipated to Showcase Highest Growth Rate During the Forecast Period

The C4 Systems segment is expected to grow significantly during the forecast period. The growth is due to increased defense spending and the rising procurement of command, control, and advanced communications systems for various military operations. Owing to the rising military aggression by China, the US has been investing in improving its C4ISR capabilities. Furthermore, the political disputes among neighboring countries, the ongoing Russia-Ukraine war, and the growing tension between China and Taiwan led to increased defense expenditure from European and Asian countries. These countries are focusing on enhancing their defense capabilities through the procurement of next-generation weapons systems. For instance,

In April 2022, Northrop Grumman Corporation, a US-based defense manufacturer, entered into a partnership with AT&T to develop a new digital battle network using 5G communications technology to support the transfer of critical information across military services and domains. The communication systems are anticipated to aid the Joint All-Domain Command and Control (JADC2) system.

Earlier in February 2022, Lockheed Martin Corporation was awarded a prototype project agreement (PPA) from the US Department of Defense to develop a 5G communications network infrastructure testbed.The testbed will aim to field and integrate 5G technology rapidly across the land, water, air, space, and cyber domains. Also, ongoing territorial conflicts necessitate the procurement of armored vehicles and ground force equipment, which, in turn, is expected to generate more demand for better and more advanced tactical communication links, along with land-based electronic warfare equipment and systems. Hence, investments in such technologies are anticipated to propel the growth of the segment in the forecast period.

Asia-Pacific is Anticipated to Lead the Market During the Forecast Period

Asia-Pacific is projected to show the highest growth during the forecast period. Countries in Asia-Pacific are undergoing a radical transformation driven by the rapid modernization of their defense forces. China and India are taking huge strides toward strengthening the current capabilities of their defense forces and are thereby expending significant financial and other resources to empower and integrate their armies with modern technologies, including land-based C4ISR systems. For instance, China continues to place a high priority on modernizing the People's Liberation Army's (PLA's) command, control, communications, computers, intelligence, surveillance, and reconnaissance (C4ISR) system as a response to trends in modern warfare that emphasize the importance of rapid decision-making and information sharing and processing. The PLA is seeking to improve its technological capabilities and organizational structure to command complex joint operations on near and distant battlefields with increasingly sophisticated weaponry. The PLA is currently fielding advanced automated command systems, such as its Integrated Command Platform, with units at lower echelons across the force. Similar programs have been undertaken by other armed forces in the region, thereby driving the market into focus during the forecast period.

Land Based C4ISR Industry Overview

The land-based C4ISR market is moderately fragmented in nature, with several players holding significant shares in the market. Some prominent market players are Elbit Systems Ltd., BAE Systems plc, Saab AB, THALES, Lockheed Martin Corporation, and Northrop Grumman Corporation. However, several other manufacturers provide C4ISR solutions for the land platform.

Technological advancements in C4ISR systems and the demand for multi-functional systems are propelling the investments of manufacturers in the research and development of cost-effective solutions. Favorable government policies and the existing global security scenario are fostering strategic collaboration between regional and global market players to merge their technological prowess and jointly develop sophisticated land-based C4ISR systems. Consolidation of the market may occur during the forecast period on account of joint ventures (JVs) and mergers and acquisitions (M&As). For instance, ThalesRaytheonSystems, a joint venture between THALES and Raytheon Technologies Corporation, has been combining technologies to develop superior ISR systems and gain a competitive advantage over the other market players. However, with the rapid modernization of technology, the competitive advantage may be short-lived, as other players would surely develop products with similar or even superior capabilities.

Additional Benefits:

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

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