

Maritime Situational Awareness Systems - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts (2024 - 2029)

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Report description:

The Maritime Situational Awareness Systems Market size is estimated at USD 2.24 billion in 2024, and is expected to reach USD 2.79 billion by 2029, growing at a CAGR of 4.51% during the forecast period (2024-2029).

The growth in maritime boundary violations, smuggling and trafficking, terrorism, and rising tensions between countries over territorial waters, etc., is forcing governments to enhance their maritime situational awareness capabilities, thereby propelling the growth of the market studied.

Countries around the world are heavily investing in the development, expansion, modernization, and gradation of their existing naval fleet. The development and procurement of new naval vessels, such as frigates, submarines, etc., are expected to generate demand for newer generation sea-based situational awareness systems for surveillance and threat detection purposes. The naval fleets of countries such as the United States, the United Kingdom, China, India, and Japan have been witnessing significant growth over the past few years as they are strengthening their military capacities and global reach. The increasing miniaturization and improving accuracy of these systems have been propelling their different maritime platforms. Their high reliability and availability at low costs have encouraged militaries to procure these systems in abundance.

Maritime Situational Awareness Systems Market Trends

Command and Control Segment to Exhibit the Highest Growth Rate During the Forecast Period

The increasing need for coordination between different fighting assets during combat is expected to drive the market for command-and-control systems. Naval forces across the world are investing heavily in the development of new vessels and

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equipping them with state-of-the-art battle management software and systems to increase their situational awareness.

Western naval powerhouses are increasingly focusing on frigate building and are investing in the development of frigate command and control systems. For instance, in January 2022, the US Naval Research Laboratory launched its PROTEUS pilot project to try the integrated system of maritime domain awareness capabilities. PROTEUS is used to identify, query, and filter maritime vessels based on user-defined criteria and provides near-real-time global maritime situational awareness. This is achieved by providing multi-source data ingestion and fusion services and automatically generating and maintaining global vessel tracks. In August 2023, the German Navy received the C2 maritime solution. The contract is a part of the GMN 2 (German Mission Network Block 2) project that aims to integrate and standardize C2 information systems and enhance the interoperability of domestic and international operations. The aforementioned factors and instances are propelling the development of maritime command and control systems across the world.

Asia-Pacific to Exhibit the Highest Growth Rate During the Forecast Period

Maritime situational awareness is an essential element for any country that wishes to govern its maritime zones. Asia-Pacific is home to countries such as China, India, Australia, Japan, South Korea, etc. These countries are significantly increasing their spending on the development and procurement of naval situational awareness systems to increase their battle preparedness over the sea. The market studied in the region is driven by technological innovations. For instance, in November 2023, Teledyne FLIR Defense launched its advanced maritime surveillance system, the SeaFLIR 240-EP, which provides surveillance for sea-based ISR, search and rescue, and SOF mission's advanced optics and image processing. It delivers services such as object detection, recognition, and identification.

China has sped up the integration process of its electro-optical sites, surface wave radars, and missile defense systems, a move that is expected to provide a significant boost to China's maritime situational awareness capabilities. China is rapidly retiring older, single-mission warships in favor of larger, multi-mission vessels equipped with advanced anti-ship, anti-air, and anti-submarine systems, sensors, and command-and-control networks. Similarly, the Indian Navy has been focusing on developing indigenous platforms, systems, sensors, and weapons as part of the modernization and expansion of its maritime forces. Such instances are propelling the growth of the maritime situational awareness systems market in the Asia-Pacific region.

Maritime Situational Awareness Systems Industry Overview

The maritime situational awareness market is semi-consolidated in nature. Lockheed Martin Corporation, Elbit Systems Ltd, BAE Systems PLC, Leonardo SpA, and THALES are some of the prominent players in the market studied. The market is driven by large-scale investments in research and development from key players in the field of technologies such as space-based network-centric data sharing, artificial intelligence, etc. The maritime situational awareness systems market has seen increasing demand with the incorporation of new products and equipment that are ready to be commissioned into the naval forces, such as network sensors, temperature sensors, and other equipment. Market players are expected to enjoy a healthy growth in revenue owing to fleet expansion and modernization efforts from navies across the world and several long-term contracts that are awarded for situational awareness technologies.

Additional Benefits:

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

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