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

Market Report | 2024-02-17 | 100 pages | Mordor Intelligence

AVAILABLE LICENSES:

- Single User License $4750.00
- Team License (1-7 Users) $5250.00
- Site License $6500.00
- Corporate License $8750.00

Report description:

The Space-based C4ISR Market size is estimated at USD 3.27 billion in 2024, and is expected to reach USD 4.23 billion by 2029, growing at a CAGR of 5.21% during the forecast period (2024-2029).

Intelligence, surveillance, and reconnaissance (ISR) are considered to be critical components of a nation's strategic defense. Several countries are progressively adopting space-based systems for better situational awareness, secure and faster communication, and threat detection capabilities. Various nations worldwide are actively employing ISR systems throughout the spectrum to collect, process, and disseminate data in support of current and future national security needs. Moreover, several nations have also acquired powerful space-based image intelligence (IMINT) and are developing even greater capabilities to ensure smooth military operations in space soon.

The growth in the adoption of geospatial systems for better surveillance and faster response time, as well as technological advancements in microelectronics, have been vital in developing sophisticated space-based C4ISR systems with advanced features while diminishing associated costs related to research and development. The growing demand for space-based C4ISR has also led to a significant increase in concerns over cybersecurity and potential attacks by space weapons. Moreover, limitations in terms of the design of space-based C4ISR systems due to defense regulations as well as limitations in the technological advancement, are some of the factors which is expected to hamper the growth of the market over the forecast period.

Space-based C4ISR Market Trends

The ISR Segment is Expected to Dominate the Market During the Forecast Period

Intelligence, surveillance, and reconnaissance (ISR) capabilities within the space-based C4ISR market represent the eyes and ears of modern defense strategies. ISR technologies in space encompass advanced satellite systems, remote sensing, and data analytics, enabling precise and timely intelligence gathering, strategic surveillance, and reconnaissance, crucial for informed decision-making in national security. The changing face of warfare moving toward hybrid scenarios will be underpinned by joint operations and will require interoperability to allow effective operation.

The US defense is exploring and is interested in launching LEO and MEO satellite constellations with several advantages over GEO, where traditional military satellites fly. LEO satellites are smaller in size because they require less propulsion and less power, and the data latency is reduced. Russia launched Kosmos 2550, a new type of ship-locating radar imaging satellite, in June 2021. The satellite is equipped with active radar to capture day-and-night imagery and all-weather movement of ships, allowing the Russian armed forces to monitor the location, and identify and target enemy naval forces. Thus, many investments are being made to research, develop, and procure advanced ISR systems that may drive the market's growth. Technological advancement, race to gain space dominance, and increased budget allocations on military satellites are further expected to drive the growth of this segment during the forecast period.

Asia-Pacific is Expected to Register the Highest Growth Rate During the Forecast Period

The increasing investments toward a robust infrastructure framework for the rapid development and deployment of space-based C4ISR systems in the Asia-Pacific are bolstering the growth of the market in the region. China has advanced space-based C4ISR capabilities, a growing fleet of modern launch vehicles, the BeiDou satellite navigation program comparable to the US GPS, an array of counter space and ASAT, and an advanced manned space program. After the establishment of the Strategic Support Force in 2015, China completed its 48-satellite BeiDou constellation for position, navigation, and timing (PNT) that expanded its communications and ISR satellites in geosynchronous-Earth orbit (GEO) and expanded its low-Earth orbit (LEO) satellites for communications, electronic, signals, and geospatial intelligence. Furthermore, the rapid expansion of Chinese space capabilities, especially in low earth orbit, created a robust, redundant, and integrated C4ISR network. India is investing highly in improving its robust military communication infrastructure. The country has three operational dedicated communication satellites for military purposes in service and several dual-purpose satellites. These satellites provide secure and reliable communication links to the Indian military that help to operate effectively and efficiently in various environments and situations. For instance, in June, the Indian Ministry of Defense (MoD) made plans to approve the development and production of an electro-optical satellite weighing between 150-200 kg. The satellite would provide space-based intelligence, surveillance, and reconnaissance which provide backup support if military satellite gets disabled.

Space-based C4ISR Industry Overview

The Space-based C4ISR market is fragmented, with several international and regional players supporting the demand from the global armed forces. Some of the prominent players in the market are Northrop Grumman Corporation, Lockheed Martin Corporation, L3Harris Technologies Inc., CACI International Inc., and Elbit Systems Ltd.

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 in R&D for developing space-based 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.

Additional Benefits:

- The market estimate (ME) sheet in Excel format

- 3 months of analyst support

Table of Contents:

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

Market Report | 2024-02-17 | 100 pages | Mordor Intelligence

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 License	$4750.00
	Team License (1-7 Users)	$5250.00
	Site License	$6500.00
	Corporate License	$8750.00
	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*		Phone*	
First Name*		Last Name*	
Job title*			
Company Name*		EU Vat / Tax ID / NIP number*	
Address*		City*	
Zip Code*		Country*	
		Date	2025-05-08
		Signature