United States C4ISR - 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 United States C4ISR Market size is estimated at USD 3.28 billion in 2024, and is expected to reach USD 3.76 billion by 2029, growing at a CAGR of 2.80% during the forecast period (2024-2029).

The growth in terrorism, threats from adversaries, and increasing global territorial tensions are some of the major factors that generate the demand for advanced systems to carry out intelligence, surveillance, and reconnaissance missions across land and sea borders of the United States.

The growing investments into counter stealth technology, network-centric battle management technology, and unmanned and autonomous vehicles technologies are major areas of the US Department of Defense (DoD) investments to enhance the C4ISR capabilities of the country. Such investments are expected to drive the growth of the market studied in the coming years.

With the growing military expenditure, the United States is subsequently investing in the research and development of new and advanced C4ISR systems. The investments are focused on the development of advanced enemy detection and tracking systems and network-centric battle communication technology to counter a wide range of threats.

United States C4ISR Market Trends

Air Segment is Projected to Dominate Market Share During the Forecast Period

The US Air Force plans 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 the development of advanced C4ISR

solutions, which has become one of the key priorities of the warfare strategy of the United States.

The US Air Force must accelerate investment in competitive capabilities to compete in highly contested environments. This requires the Air Force to begin divesting in systems such as the RQ-4 Block 30. Furthermore, the Northrop Grumman E-8 Joint STARS cannot survive in the high-end fight and maybe divested. Divestment of these weapon systems provides resources to fund emerging intelligence, surveillance, and reconnaissance capabilities that may penetrate and collect data in the highly contested environment.

The US Special Operations Command also divested outdated intelligence, surveillance, reconnaissance, and global video surveillance capabilities for a total savings of USD 117.9 million in FY 2022. The Pentagon allocated USD 12.7 billion in FY 2023 for command, control, communications, computers, and intelligence systems. The US armed forces are modernizing their special mission aircraft fleet with 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 into the development of advanced communication and situational awareness systems are expected to accelerate the growth of the market studied.

Intelligence, Surveillance, and Reconnaissance (ISR) to Witness Highest Growth During the Forecast Period

The United States is investing in developing new and advanced C4ISR systems. The investments focus on developing advanced enemy detection and tracking systems and network-centric battle communication technology to counter various threats.

The Department of Defense (DoD) is transforming and developing new concepts for future joint military operations to achieve full spectrum dominance. Technologies such as artificial intelligence and machine learning are being integrated with defense assets to increase battlefield operational efficiency and support the effective integration of command-and-control systems with autonomous defense assets.

For the FY2023 budget, the Department of Defense has requested about USD 12.8 billion for C4I systems. The funding is for several programs such as tactical network transport (TNT), handheld manpack small form fit (HMS) radio, joint regional security stacks (JRSS), information systems security program (ISSP), crypto devices, key management infrastructure, and nuclear command and control equipping the cyber mission forces, the Air Force National Airborne Operations Center (NAOC) recapitalization program, the Navy's Consolidated Afloat Networks and Enterprise Services (CANES), and the Integrated Personnel and Pay System-Army (IPPS-A).

Currently, the US Navy is looking for a common combat system connecting ships in the future. In February 2022, Leidos was awarded a USD 22.62 million contract (cost-plus-fixed-fee) from the US Navy for the C4ISR for a navy carrier-strike group and assigned/attached units. 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.

United States C4ISR Industry Overview

The US C4ISR market is fragmented, with many players providing various systems like tactical communications systems, UAVs (unmanned aerial vehicles), USVs (unmanned sea vehicles), space systems, etc. Some of the prominent players in the market are Lockheed Martin Corporation, L3Harris Technologies Inc., BAE Systems PLC, Northrop Grumman Corporation, and Elbit Systems Ltd. The innovation of new and advanced C4ISR systems is the major strategy of the players in the market to increase their share. The 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 studied in the coming years.

Additional Benefits:

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

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