

Drone Detection Market by Technology (Radar, RF Scanner, Optical), Application (Critical Infrastructure, Airport, Stadium, Prison, Power Plant, Oil & Gas, Border Security, Military), Type (Ground-Based, Handheld), Range and Region - Global Forecast to 2029

Market Report | 2025-02-25 | 296 pages | MarketsandMarkets

AVAILABLE LICENSES:

- Single User \$4950.00
- Multi User \$6650.00
- Corporate License \$8150.00
- Enterprise Site License \$10000.00

Report description:

The Drone detection market is estimated in terms of market size to be USD 659.4 million in 2024 to USD 2,329.9 million by 2029, at a CAGR of 28.7%. The drivers for the drone detection market include the increasing need for drone detection systems, regional conflicts and geopolitical tensions, and rising unauthorized drone activities. The growing frequency of unauthorized drone operations is a significant factor driving the adoption of drone detection systems. These activities pose substantial risks to military facilities, critical infrastructure, airports, and public spaces, leading to heightened security concerns across various sectors. Drones are increasingly used for illegal surveillance, smuggling, and intelligence gathering, which can compromise national security and operational safety. Unauthorized drone activities are difficult to detect with conventional security systems due to their small size, low altitude, and high maneuverability, making it essential to deploy detection solutions that are specifically designed to detect drones.

?The radar technology will account for the largest market share in the Drone detection market during the forecast period.? Radar technology is expected to dominate the drone detection market due to its ability to detect and track UAVs over long distances in all weather conditions. Unlike optical and infrared sensors, which are limited by visibility factors such as fog, rain, or darkness, radar systems provide continuous surveillance, making them highly effective for securing military bases, airports, power plants, and border areas. Additionally, radar can track multiple drones simultaneously and differentiate them from birds or other airborne objects using advanced signal processing and Doppler technology, reducing false alarms and improving detection accuracy. The integration of artificial intelligence (AI) and machine learning (ML) further enhances radar-based drone detection by improving classification accuracy and automating threat assessments. Modern radar systems are also designed to detect

Scotts International. EU Vat number: PL 6772247784

tel. 0048 603 394 346 e-mail: support@scott's-international.com

www.scott's-international.com

low-flying and small-sized drones that might evade traditional air defense systems. Furthermore, radar is often integrated with other detection technologies, such as radio frequency (RF) sensors and acoustic detectors, to provide a multi-layered security approach. These advantages make radar the most reliable and effective technology for drone detection, driving its dominance in the market during the forecast period.

?The ground-based segment will account for the largest market share in the Drone detection market during the forecast period.?

Based on type, the ground-based segment will account for the largest market share in the Drone detection market during the forecast period. Ground-based drone detection systems are expected to hold the largest market share in the drone detection market due to their cost-effectiveness, scalability, and ability to provide continuous surveillance. Unlike airborne or space-based detection systems, ground-based solutions are easier to deploy, maintain, and integrate with existing security infrastructure, making them the preferred choice for protecting airports, military bases, government facilities, and critical infrastructure. These systems utilize a combination of radar, radio frequency (RF) sensors, acoustic sensors, and electro-optical/infrared (EO/IR) cameras to detect, track, and classify drones in real time. Their ability to operate in all weather conditions and adapt to different threat levels further strengthens their market dominance. Another key advantage of ground-based drone detection is its ability to cover large areas with a network of strategically placed sensors, ensuring comprehensive perimeter security. Advanced ground-based systems can use AI and ML to enhance their detection accuracy, minimize false alarms, and automate threat response mechanisms. Additionally, these systems can be integrated with counter-drone solutions, such as jamming and spoofing technologies, to neutralize unauthorized drones. Given their reliability, affordability, and effectiveness ground-based drone detection systems are expected to lead the market during the forecast period.

?The North American market is estimated to lead the market.?

The North American Drone detection market is expected to account for the highest market share during the forecast period. This is due to the high adoption of advanced security technologies, increasing incidents of unauthorized drone activity, and strong government regulations. The region, led by the United States and Canada, has a well-established defense and homeland security infrastructure, which drives significant investments in drone detection systems for military bases, and airports. The rising concerns over drone-related security threats, including potential terrorist activities, smuggling, and airspace intrusions, have led to the widespread deployment of ground-based and radar-based detection solutions. The presence of leading defense contractors and technology firms in North America ensures continuous innovation and availability of advanced drone detection technologies. The increasing number of partnerships between defense organizations and private sector companies for developing and deploying counter-drone solutions enhances the market growth in the region. Due to these factors, North America is the leading market for drone detection systems during the forecast period.

Breakdown of primaries

The study contains insights from various industry experts, ranging from component suppliers to Tier 1 companies and OEMs. The break-up of the primaries is as follows:

?□By Company Type: Tier 1?35%; Tier 2?45%; and Tier 3?20%

?□By Designation: C Level?35%; Directors?25%; and Others?40%

?□By Region: North America?20%; Europe?25%; Asia Pacific?35%; Middle East?10%; RoW?10%

Lockheed Martin Corporation (US), RTX (US), Northrop Grumman (US), Teledyne FLIR LLC, and Elbit Systems Ltd. (Israel) are some of the leading players operating in the Drone detection market.

Research Coverage

The study covers the Drone detection market across various segments and subsegments. It aims to estimate the size and growth potential of this market across different segments based on technology, application, type, range, application, and region. This study also includes an in-depth competitive analysis of the key players in the market, along with their company profiles, key observations related to their solutions and business offerings, recent developments undertaken by them, and key market strategies adopted by them.

Key benefits of buying this report:

This report will help the market leaders/new entrants in this market with information on the closest approximations of the revenue numbers for the overall Drone detection market and its subsegments. The report covers the entire ecosystem of the Drone detection market. It will help stakeholders understand the competitive landscape and gain more insights to position their

Scotts International. EU Vat number: PL 6772247784

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

businesses better and plan suitable go-to-market strategies. The report will also help stakeholders understand the pulse of the market and provide them with information on key market drivers, restraints, challenges, and opportunities.

The report provides insights on the following pointers:

- ? Analysis of key drivers and factors, such as the increasing need for drone detection systems, regional conflicts and geopolitical tensions, and rising unauthorized drone activities could contribute to an increase in the Drone detection market.
- ?Product Development: In-depth analysis of product innovation/development by companies across various region.
- ? Market Development: Comprehensive information about lucrative markets ? the report analyses the Drone detection market across varied regions.
- ? Market Diversification: Exhaustive information about new solutions, untapped geographies, recent developments, and investments in Drone detection market.
- ? Competitive Assessment: In-depth assessment of market shares, growth strategies, and product offerings of leading players like Lockheed Martin Corporation (US), RTX (US), Northrop Grumman (US), Teledyne FLIR LLC, Elbit Systems Ltd. (Israel) among others in the Drone detection market.

Table of Contents:

1 INTRODUCTION 27

1.1 STUDY OBJECTIVES 27

1.2 MARKET DEFINITION 27

1.3 STUDY SCOPE 28

1.3.1 MARKET SEGMENTATION & GEOGRAPHIC SPREAD 28

1.3.2 INCLUSIONS & EXCLUSIONS 28

1.4 YEARS CONSIDERED 29

1.5 CURRENCY CONSIDERED 29

1.6 KEY STAKEHOLDERS 30

2 RESEARCH METHODOLOGY 31

2.1 RESEARCH DATA 31

2.1.1 SECONDARY DATA 32

2.1.1.1 Key data from secondary sources 33

2.1.2 PRIMARY DATA 33

2.1.2.1 Insights by key primaries 34

2.1.2.2 Key data from primary sources 34

2.2 FACTOR ANALYSIS 35

2.2.1 INTRODUCTION 35

2.2.2 DEMAND-SIDE INDICATORS 35

2.2.3 SUPPLY-SIDE INDICATORS 35

2.3 RUSSIA-UKRAINE WAR: IMPACT ANALYSIS 36

2.3.1 IMPACT OF RUSSIA’S INVASION OF UKRAINE ON DEFENSE INDUSTRY 36

2.3.2 IMPACT OF RUSSIA-UKRAINE WAR ON DRONE DETECTION MARKET 37

2.3.2.1 Effects of Russia-Ukraine War: 37

2.3.2.1.1 Increased demand for counter-drone systems 37

2.3.2.1.2 Evolution of detection technologies 37

2.3.2.1.3 Expansion of portable and mobile detection systems 37

2.3.2.1.4 Influence on regulatory and procurement trends 37

2.3.2.1.5 Technological collaboration and innovation 37

2.3.2.1.6 Conclusion 38

2.4 MARKET SIZE ESTIMATION 38

2.4.1	BOTTOM-UP APPROACH	39
2.4.2	TOP-DOWN APPROACH	40
2.5	DATA TRIANGULATION	41
2.6	RESEARCH ASSUMPTIONS	42
2.7	RESEARCH LIMITATIONS	42
2.8	RISK ASSESSMENT	42
3	EXECUTIVE SUMMARY	43
4	PREMIUM INSIGHTS	47
4.1	ATTRACTIVE OPPORTUNITIES FOR PLAYERS IN DRONE DETECTION MARKET	47
4.2	DRONE DETECTION MARKET, BY APPLICATION	47
4.3	DRONE DETECTION MARKET, BY TECHNOLOGY	48
4.4	DRONE DETECTION MARKET, BY RANGE	48
4.5	DRONE DETECTION MARKET, BY TYPE	49
5	MARKET OVERVIEW	50
5.1	INTRODUCTION	50
5.2	MARKET DYNAMICS	50
5.2.1	DRIVERS	51
5.2.1.1	Increased need for drone detection systems	51
5.2.1.2	Regional conflicts and geopolitical tensions	51
5.2.1.3	Rise in unauthorized drone activities	52
5.2.1.4	Adoption of drone detection systems in critical infrastructure	53
5.2.2	RESTRAINTS	54
5.2.2.1	High initial deployment and operational costs	54
5.2.2.2	Evolving regulatory frameworks	54
5.2.3	OPPORTUNITIES	55
5.2.3.1	Expansion of IoT and AI in drone detection systems	55
5.2.3.2	Advancements in detection technologies	55
5.2.3.3	Rising defense and homeland security budgets	55
5.2.4	CHALLENGES	56
5.2.4.1	Cybersecurity risks in connected detection systems	56
5.2.4.2	Accuracy issues in complex environments	57
5.3	PRICING ANALYSIS	57
5.3.1	INDICATIVE PRICING ANALYSIS OF DRONE DETECTION SYSTEMS, BY TECHNOLOGY	58
5.3.2	INDICATIVE PRICING ANALYSIS OF DRONE DETECTION SYSTEMS, BY REGION	58
5.4	VALUE CHAIN ANALYSIS	59
5.5	ECOSYSTEM ANALYSIS	60
5.5.1	DRONE DETECTION PROVIDERS	60
5.5.2	END USERS	60
5.5.3	REGULATORY BODIES	60
5.6	TECHNOLOGY ANALYSIS	62
5.6.1	KEY TECHNOLOGIES	62
5.6.1.1	Radar-based detection	62
5.6.1.2	Radio Frequency (RF) scanning	63
5.6.1.3	Electro-optical (EO) & infrared (IR) sensors	63
5.6.2	COMPLEMENTARY TECHNOLOGIES	64
5.6.2.1	Acoustic detection	64

Scotts International. EU Vat number: PL 6772247784

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

5.6.2.2	LiDAR-based drone tracking	64
5.6.2.3	Counter-unmanned aerial system (C-UAS)	64
5.6.2.4	5G-enabled detection systems	64
5.6.3	ADJACENT TECHNOLOGIES	65
5.6.3.1	Counter-drone systems	65
5.6.3.1.1	Jamming & spoofing	65
5.6.3.1.2	Directed energy weapons (DEWs)	65
5.6.3.1.3	Hard kill solutions	65
5.7	TRENDS & DISRUPTIONS IMPACTING CUSTOMER BUSINESS	66
5.8	HS CODES	67
5.8.1	IMPORT SCENARIO (HS CODE 852610)	67
5.8.2	EXPORT SCENARIO (HS CODE 852610)	69
5.9	REGULATORY LANDSCAPE	71
5.9.1	REGULATIONS, BY COUNTRY	73
5.10	CASE STUDY ANALYSIS	75
5.10.1	BYU DEVELOPED LOW-COST DRONE AIR TRAFFIC CONTROL SYSTEM USING NETWORK OF SMALL RADAR UNITS	75
5.10.2	ASIAN GOVERNMENT STRENGTHENED NATIONAL SECURITY BY ADOPTING D-FEND SOLUTIONS? ENFORCEAIR	76
5.10.3	BRAZILIAN AIR FORCE ADOPTED THALES? RADARS TO REINFORCE ITS AIR DEFENSE CAPABILITIES	76
5.10.4	BIRDS OF MAGYAR BRIGADE (UKRAINE) DEPLOYED MOBILE RADAR STATIONS TO DETECT DRONES GUIDED BY FIBER OPTICS	77
5.11	KEY STAKEHOLDERS & BUYING CRITERIA	77
5.11.1	KEY STAKEHOLDERS IN BUYING PROCESS	77
5.11.2	BUYING CRITERIA	78
5.12	KEY CONFERENCES & EVENTS	79
5.13	INVESTMENT & FUNDING SCENARIO	80
5.14	OPERATIONAL DATA	81
5.15	BILL OF MATERIALS	86
5.15.1	FACTORS AFFECTING COST	87
5.16	BUSINESS MODELS	87
5.16.1	DIRECT SALES MODEL	87
5.16.2	SUBSCRIPTION MODEL	88
5.16.3	SYSTEM INTEGRATION & CUSTOMIZATION MODEL	89
5.16.4	CONCLUSION	89
5.17	TOTAL COST OF OWNERSHIP (TCO)	90
5.17.1	INITIAL ACQUISITION COST	90
5.17.2	OPERATING COSTS	91
5.17.3	DOWNTIME & DISRUPTION COST	91
5.17.4	LIFETIME EXTENSION COST	91
5.17.5	END-OF-LIFE COST	92
5.17.6	RISK MANAGEMENT COST	92
5.17.7	CONCLUSION	92
5.18	TECHNOLOGY ROADMAP	93
5.18.1	EMERGING TRENDS IN DRONE DETECTION MARKET	94
5.19	IMPACT OF ARTIFICIAL INTELLIGENCE	95
5.19.1	INTRODUCTION	95
5.19.2	IMPACT OF AI ON DEFENSE INDUSTRY	95
5.19.3	ADOPTION OF AI IN MILITARY BY TOP COUNTRIES	95

Scotts International. EU Vat number: PL 6772247784

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

5.19.4	IMPACT OF AI ON DRONE DETECTION MARKET	96
5.19.4.1	AI-powered sensor fusion	96
5.19.4.2	Deep learning-based object recognition	96
5.19.4.3	Automated threat classification	96
5.19.4.4	AI-enabled RF signal analysis	97
5.19.4.5	Predictive analytics for drone swarm detection	97
5.19.4.6	Autonomous countermeasures	97
5.19.4.7	Future outlook	97
5.20	MACROECONOMIC OUTLOOK	98
5.20.1	INTRODUCTION	98
5.20.2	MACROECONOMIC OUTLOOK FOR NORTH AMERICA, EUROPE, ASIA PACIFIC, AND MIDDLE EAST	98
5.20.2.1	North America	98
5.20.2.2	Europe	98
5.20.2.3	Asia Pacific	98
5.20.2.4	Middle East	98
5.20.3	MACROECONOMIC OUTLOOK FOR LATIN AMERICA AND AFRICA	99
5.20.3.1	Latin America	99
5.20.3.2	Africa	99
6	INDUSTRY TRENDS	101
6.1	INTRODUCTION	101
6.2	TECHNOLOGY TRENDS	101
6.2.1	AI-POWERED DETECTION SYSTEMS	102
6.2.2	MULTI-SENSOR FUSION	102
6.2.3	COGNITIVE RADAR SYSTEMS	103
6.2.4	3D DRONE LOCALIZATION AND TRACKING	103
6.3	IMPACT OF MEGATRENDS	104
6.3.1	ARTIFICIAL INTELLIGENCE (AI)	104
6.3.2	CLOUD-BASED SURVEILLANCE AND BIG DATA ANALYTICS	104
6.3.3	INTERNET OF THINGS (IOT)	105
6.4	SUPPLY CHAIN ANALYSIS	105
6.5	PATENT ANALYSIS	107
?		
7	DRONE DETECTION MARKET, BY APPLICATION	114
7.1	INTRODUCTION	115
7.2	CRITICAL INFRASTRUCTURE	116
7.2.1	STADIUMS	117
7.2.1.1	Need for enhanced security to drive segment	117
7.2.1.2	Use case: COTA deployed Dedrone's FixedSite drone detection, tracking, and identification (DTI) system to enhance safety	117
7.2.2	AIRPORTS	117
7.2.2.1	Need to ensure airspace security at airports to drive segment	117
7.2.2.2	Use case: Sheremet Airport deployed Yenot-SD, AI-powered radar system developed by Kaspersky Lab, to mitigate threats	118
7.2.3	PRISONS	118
7.2.3.1	Rising use of drones for smuggling to drive demand	118
7.2.3.2	Use case: South Carolina Department of Corrections enhanced security with advanced drone detection systems	119

Scotts International. EU Vat number: PL 6772247784

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

7.2.4	POWER PLANTS	119
7.2.4.1	Rising threat of malicious drone activities to drive segment	119
7.2.4.2	Use case: Integrating advanced technologies into drone detectors to enhance security in power plants	119
7.2.5	OIL & GAS FIELDS	120
7.2.5.1	Need for protecting oil & gas fields from unauthorized drones to boost demand	120
7.2.5.2	Use case: Offshore oil rig security with counter-UAS radar	120
7.2.6	CORPORATE & INDUSTRIAL FACILITIES	120
7.2.6.1	Need to protect operations from aerial intrusion to drive market	120
7.2.6.2	Use case: Volke partnered with Dedrone to deploy comprehensive surveillance and countermeasure system	121
7.2.7	OTHERS	121
7.3	MILITARY & DEFENSE	121
7.3.1	BORDER SECURITY	122
7.3.1.1	Increasing use of drones for illegal border activities and surveillance to drive segment	122
7.3.1.2	Use case: Indian Army strengthened border security with drone detection systems	122
7.3.2	PORTABLE ISR	123
7.3.2.1	Increasing demand for adaptable security technologies to drive market	123
7.3.2.2	Use case: Indian Army deployed Man Portable Counter Drone System to protect borders	123
7.3.3	MILITARY BASE	123
7.3.3.1	Rising drone incursions, security needs, and advancements in counter-drone technology to drive market	123
7.3.3.2	Use case: US Department of Defense enhanced security with drone detection systems	124
7.4	GOVERNMENT & LAW ENFORCEMENT	124
7.4.1	RIISING THREAT OF UNAUTHORIZED DRONE ACTIVITY IMPACTING PUBLIC SAFETY TO DRIVE MARKET	124
7.4.1.1	Use case: Mossos d'Esquadra deployed Dedrone's advanced airspace security solution to enable precise identification of drone pilots	125
8	DRONE DETECTION MARKET, BY TECHNOLOGY	126
8.1	INTRODUCTION	127
8.2	RADAR SYSTEM	128
8.2.1	RIISING THREAT OF DRONES AND TECHNOLOGICAL ADVANCEMENTS TO DRIVE SEGMENT	128
8.2.1.1	Use case: Securing critical infrastructure with radar-based drone detection systems	128
8.3	RF SCANNER	129
8.3.1	NEED FOR ENHANCED SURVEILLANCE AND SECURITY IN CRITICAL INFRASTRUCTURE TO DRIVE SEGMENT	129
8.3.1.1	Use case: Grand Forks Air Force Base deployed DroneShield's DroneSentry system to enhance security	129
8.4	OPTICAL SYSTEM	130
8.4.1	ADVANCEMENTS IN OPTICAL TECHNOLOGIES TO DRIVE SEGMENT	130
8.4.1.1	Use case: Development of advanced electro-optical system for UAV tracking by DRDO	130
9	DRONE DETECTION MARKET, BY RANGE	131
9.1	INTRODUCTION	132
9.2	< 5 KM	133
9.2.1	NEED FOR COST-EFFECTIVE SOLUTIONS AND ADVANCEMENTS IN SENSOR TECHNOLOGY TO DRIVE MARKET	133
9.3	5?10 KM	133
9.3.1	INCREASING DEMAND FOR EFFICIENT COUNTER-DRONE TECHNOLOGIES TO DRIVE MARKET	133
9.4	> 10 KM	134
9.4.1	NEED FOR LONG-RANGE SURVEILLANCE TO PROTECT MILITARY ASSETS TO DRIVE MARKET	134
10	DRONE DETECTION MARKET, BY TYPE	135
10.1	INTRODUCTION	136
10.2	GROUND-BASED	137

Scotts International. EU Vat number: PL 6772247784

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

10.2.1	USE CASE: IAI'S ELTA DIVISION DEVELOPED DRONE GUARD GEN 5 FOR SUPERIOR THREAT IDENTIFICATION AND TRACKING	137
10.2.2	FIXED	138
10.2.2.1	Rising security threats from unauthorized drones to drive demand	138
10.2.3	MOBILE	138
10.2.3.1	Rising need for flexible drone detection systems to drive market	138
10.3	HANDHELD	138
10.3.1	GOVERNMENT INVESTMENTS AND ADVANCEMENTS IN RF AND EO/IR TECHNOLOGIES TO DRIVE GROWTH	138
10.3.1.1	Use case: Guardian RF developed portable handheld solution to address growing threat of FPV drones	139
11	DRONE DETECTION MARKET, BY REGION	140
11.1	INTRODUCTION	141
11.2	NORTH AMERICA	143
11.2.1	PESTLE ANALYSIS	144
11.2.2	US	148
11.2.2.1	Growing demand for integrated counter-drone technologies in military and civil sectors to drive market	148
11.2.3	CANADA	149
11.2.3.1	Need to protect airspace and critical infrastructure from UAS threats to drive market	149
11.3	EUROPE	150
11.3.1	PESTLE ANALYSIS	150
11.3.2	UK	155
11.3.2.1	Advancements in radar and detection systems to improve efficiency of counter-drone operations	155
11.3.3	FRANCE	157
11.3.3.1	Increase in defense investments and advancements in counter-drone technologies to drive market	157
11.3.4	GERMANY	158
11.3.4.1	Rising need to protect high-value industrial and military sites from unauthorized drone activity to drive market	158
11.3.5	ITALY	159
11.3.5.1	Focus on improving defense capabilities and airspace security to drive market	159
11.3.6	RUSSIA	160
11.3.6.1	Government's investments in R&D to drive technological enhancements in drone detection systems	160
11.4	ASIA PACIFIC	162
11.4.1	PESTLE ANALYSIS	162
11.4.2	CHINA	167
11.4.2.1	Regulatory frameworks and technological advancements to drive market	167
11.4.3	INDIA	168
11.4.3.1	Focus on defense modernization and increasing border security concerns to drive market	168
11.4.4	JAPAN	170
11.4.4.1	Concerns over drone threats to boost adoption of detection systems	170
11.4.5	SOUTH KOREA	171
11.4.5.1	Need to tackle increasing unauthorized drone activities to drive market	171
11.4.6	AUSTRALIA	172
11.4.6.1	Government-led initiatives and increased unauthorized drone activities to drive market	172
11.5	MIDDLE EAST	174
11.5.1	PESTLE ANALYSIS	174
11.5.2	GCC COUNTRIES	179
11.5.2.1	Saudi Arabia	179
11.5.2.1.1	Rising demand for advanced counter-UAV systems to protect national assets to drive market	179

Scotts International. EU Vat number: PL 6772247784

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

11.5.2.2	UAE	181
11.5.2.2.1	Rising threat to critical infrastructure and national security to drive market	181
11.5.3	ISRAEL	182
11.5.3.1	Focus on regional security to drive market	182
11.5.4	TURKEY	184
11.5.4.1	Emphasis on strengthening security in critical infrastructure to drive market	184
11.6	REST OF THE WORLD	185
11.6.1	PESTLE ANALYSIS	185
11.6.2	LATIN AMERICA	190
11.6.2.1	Increasing need for enhanced security to drive market	190
11.6.3	AFRICA	192
11.6.3.1	Need for advanced drone detection systems to mitigate rising use of UAVs to drive market	192
12	COMPETITIVE LANDSCAPE	194
12.1	INTRODUCTION	194
12.2	KEY PLAYER STRATEGIES/RIGHT TO WIN, 2020?2024	194
12.3	REVENUE ANALYSIS	196
12.4	MARKET SHARE ANALYSIS	197
12.5	BRAND/PRODUCT COMPARISON	200
12.6	COMPANY VALUATION AND FINANCIAL METRICS	201
12.7	COMPANY EVALUATION MATRIX: KEY PLAYERS, 2023	202
12.7.1	STARS	202
12.7.2	EMERGING LEADERS	202
12.7.3	PERVASIVE PLAYERS	202
12.7.4	PARTICIPANTS	202
12.7.5	COMPANY FOOTPRINT: KEY PLAYERS	204
12.8	COMPANY EVALUATION MATRIX: STARTUPS/SMES, 2024	208
12.8.1	PROGRESSIVE COMPANIES	208
12.8.2	RESPONSIVE COMPANIES	208
12.8.3	DYNAMIC COMPANIES	209
12.8.4	STARTING BLOCKS	209
12.8.5	COMPETITIVE BENCHMARKING	210
12.9	COMPETITIVE SCENARIO & TRENDS	212
12.9.1	PRODUCT LAUNCHES	212
12.9.2	DEALS	214
12.9.3	OTHER DEVELOPMENTS	217
13	COMPANY PROFILES	221
13.1	KEY PLAYERS	221
13.1.1	RTX	221
13.1.1.1	Business overview	221
13.1.1.2	Products offered	222
13.1.1.3	Recent developments	223
13.1.1.3.1	Product launches	223
13.1.1.3.2	Deals	223
13.1.1.3.3	Other developments	224
13.1.1.4	MnM view	224
13.1.1.4.1	Right to win	224
13.1.1.4.2	Strategic choices	224

Scotts International. EU Vat number: PL 6772247784

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

13.1.1.4.3	Weaknesses & competitive threats	225
13.1.2	NORTHROP GRUMMAN	226
13.1.2.1	Business overview	226
13.1.2.2	Products offered	227
13.1.2.3	Recent developments	228
13.1.2.3.1	Other developments	228
13.1.2.4	MnM view	228
13.1.2.4.1	Right to win	228
13.1.2.4.2	Strategic choices	228
13.1.2.4.3	Weaknesses and competitive threats	229
13.1.3	LOCKHEED MARTIN CORPORATION	230
13.1.3.1	Business overview	230
13.1.3.2	Products offered	231
13.1.3.3	Recent developments	232
13.1.3.3.1	Deals	232
13.1.3.3.2	Other developments	232
13.1.3.4	MnM view	232
13.1.3.4.1	Right to win	232
13.1.3.4.2	Strategic choices	232
13.1.3.4.3	Weaknesses and competitive threats	233
13.1.4	ELBIT SYSTEMS LTD.	234
13.1.4.1	Business overview	234
13.1.4.2	Products offered	236
13.1.4.3	Recent developments	236
13.1.4.3.1	Other developments	236
13.1.4.4	MnM view	237
13.1.4.4.1	Right to win	237
13.1.4.4.2	Strategic choices	237
13.1.4.4.3	Weaknesses and competitive threats	237
13.1.5	TELEDYNE FLIR LLC	238
13.1.5.1	Business overview	238
13.1.5.2	Products offered	240
13.1.5.3	Recent developments	241
13.1.5.3.1	Product launches	241
13.1.5.3.2	Deals	241
13.1.5.3.3	Other developments	242
13.1.5.4	MnM view	242
13.1.5.4.1	Right to win	242
13.1.5.4.2	Strategic choices	242
13.1.5.4.3	Weaknesses and competitive threats	242
13.1.6	LEONARDO S.P.A.	243
13.1.6.1	Business overview	243
13.1.6.2	Products offered	244
13.1.6.3	Recent developments	245
13.1.6.3.1	Product launches	245
13.1.6.3.2	Deals	245
13.1.6.3.3	Other developments	246

Scotts International. EU Vat number: PL 6772247784

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

13.1.7	THALES	247
13.1.7.1	Business overview	247
13.1.7.2	Products offered	248
13.1.7.3	Recent developments	249
13.1.7.3.1	Product launches	249
13.1.7.3.2	Deals	250
13.1.7.3.3	Other developments	250
13.1.8	ISRAEL AEROSPACE INDUSTRIES	252
13.1.8.1	Business overview	252
13.1.8.2	Products offered	253
13.1.8.3	Recent developments	255
13.1.8.3.1	Deals	255
13.1.8.3.2	Other developments	256
13.1.9	SAAB AB	257
13.1.9.1	Business overview	257
13.1.9.2	Products offered	258
13.1.9.3	Recent developments	259
13.1.9.3.1	Deals	259
13.1.9.3.2	Other developments	259
13.1.10	DRONESHIELD LTD	260
13.1.10.1	Business overview	260
13.1.10.2	Products offered	261
13.1.10.3	Recent developments	261
13.1.10.3.1	Product launches	261
13.1.10.3.2	Deals	262
13.1.10.3.3	Other developments	262
13.1.11	QINETIQ	263
13.1.11.1	Business overview	263
13.1.11.2	Products offered	264
13.1.11.3	Recent developments	265
13.1.11.3.1	Other developments	265
13.1.12	BHARAT ELECTRONICS LIMITED (BEL)	266
13.1.12.1	Business overview	266
13.1.12.2	Products offered	267
13.1.12.3	Recent developments	267
13.1.12.3.1	Product launches	267
13.1.12.3.2	Other developments	268
13.1.13	L3HARRIS TECHNOLOGIES, INC.	269
13.1.13.1	Business overview	269
13.1.13.2	Products offered	271
13.1.13.3	Recent developments	271
13.1.13.3.1	Deals	271
13.1.14	RHEINMETALL AG	272
13.1.14.1	Business overview	272
13.1.14.2	Products offered	273
13.1.14.3	Recent developments	274
13.1.14.3.1	Deals	274

Scotts International. EU Vat number: PL 6772247784

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

13.1.14.3.2	Other developments	274
13.1.15	ASELSAN A.S.	275
13.1.15.1	Business overview	275
13.1.15.2	Products offered	276
13.1.15.3	Recent developments	277
13.1.15.3.1	Product launches	277
13.1.15.3.2	Other developments	277
13.2	OTHER PLAYERS	278
13.2.1	WEIBEL SCIENTIFIC A/S	278
13.2.2	DEDRONE	279
13.2.3	DETECT, INC.	280
13.2.4	DRONE DEFENCE	281
13.2.5	DEFSYS SOLUTIONS PVT. LTD.	282
13.2.6	ADANI DEFENCE & AEROSPACE	283
13.2.7	ECHODYNE CORP.	284
13.2.8	ROBIN RADAR SYSTEMS	285
13.2.9	APOLLOSHIELD	286
13.2.10	AERODEFENSE	287
14	APPENDIX	288
14.1	DISCUSSION GUIDE	288
14.2	ANNEXURE	290
14.3	KNOWLEDGESTORE: MARKETSANDMARKETS? SUBSCRIPTION PORTAL	292
14.4	CUSTOMIZATION OPTIONS	294
14.5	RELATED REPORTS	294
14.6	AUTHOR DETAILS	295

Drone Detection Market by Technology (Radar, RF Scanner, Optical), Application (Critical Infrastructure, Airport, Stadium, Prison, Power Plant, Oil & Gas, Border Security, Military), Type (Ground-Based, Handheld), Range and Region - Global Forecast to 2029

Market Report | 2025-02-25 | 296 pages | MarketsandMarkets

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	\$4950.00
	Multi User	\$6650.00
	Corporate License	\$8150.00
	Enterprise Site License	\$10000.00
		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*	<input type="text"/>	Phone*	<input type="text"/>
First Name*	<input type="text"/>	Last Name*	<input type="text"/>
Job title*	<input type="text"/>		
Company Name*	<input type="text"/>	EU Vat / Tax ID / NIP number*	<input type="text"/>
Address*	<input type="text"/>	City*	<input type="text"/>

Scotts International. EU Vat number: PL 6772247784

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

Zip Code*

Country*

Date

Signature