

Global Air-Based Defense Equipment Market Assessment, By Equipment Type [Fighter Aircraft, Military Drones, Airborne Warning and Control Systems, Airborne Radars and Jammers], By Mission Role [Combat, Surveillance and Reconnaissance, Electronic Warfare, Logistics and Transport], By End-user [Air Force, Army Aviation, Naval Aviation], By Region, Opportunities and Forecast, 2018-2032F

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Report description:

Global air-based defense equipment market is projected to witness a CAGR of 5.50% during the forecast period 2025-2032, growing from USD 57.24 billion in 2024 to USD 87.83 billion in 2032. The air-based defense equipment market encompasses systems developed to counter airborne threats, including missiles, drones and aircraft. Its primary technologies include missile interceptors, anti-drone systems, radar networks, and direct weapons. The demand for air-based defense systems is growing, driven by both military and paramilitary spending, partly in response to the evolution of airborne threats, and by developments in artificial intelligence, hypersonic warfare, and electronic warfare innovations. This market is further emphasizing mobility, automation, and multi-layered space and missile defense systems. Future growth in air defense will depend on stakeholders in the sector adapting their weapons technology to respond to the use of stealth technology, swarm attacks as weaponized drones, and even space-based, air-breathing threats to national security.

There is a demand for both very high-end air defense systems and very low-cost air defense equipment to address a wide range of military and other operational situations and capabilities. The continued development of air defense equipment will continue to impact the domestic and global consequences of combat, with new and upgraded systems capitalizing on air superiority in war and the ever-changing operational picture.

For instance, in April 2025, the U.S. State Department approved a potential USD 280 million Foreign Military Sale to Romania for a Patriot Air Defense System and related equipment. The package includes radar, launchers, control stations, and support services to enhance Romania's NATO-aligned defense capabilities.

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Advanced Defense Technologies Propel Air-Based Equipment Demand

The development of advanced airborne defense systems is substantially growing the demand for air-based systems as they enhance operational ability, survivability, and the ability to execute modified missions. The implementation of advanced technologies, such as artificial intelligence, directed energy weapons, and advanced radar, is empowering air defense platforms to detect potential threats more quickly, achieve autonomous targeting capabilities, and engage with greater precision. The development of unmanned aerial systems and electronic warfare systems has provided commanders with additional maneuverability while reducing the risk to soldiers. The current geopolitical conflicts and airspace threats have accelerated the military's desire for agile, integrated, networked, joint, and multi-domain solutions. This evolution in air defense systems is changing procurement strategies while accelerating tactics, as air-based defense systems are increasingly recognized and utilized by defense forces worldwide.

For instance, in January 2025, South Korea's defense industry recorded USD 9.5 billion in exports in 2024, driven by rising global demand and major contracts despite falling short of its annual target. Companies such as Hanwha Aerospace, Hyundai Rotem, LIG Nex1, and Korea Aerospace Industries experienced significant profit surges, with Hanwha leading the way due to the K9 and Chunmoo system exports.

Fighter Jets Drive Global Air-Based Defense Equipment Market Demand

Fighter jets are the driving force behind demand growth for air military platforms and systems, as nations focus on achieving air superiority and adapting to the changing needs of defense. Fighter jets lead the way, with many nations investing in advanced aircraft to gain air superiority, with aircraft like the F-35 and Su-57. There is a growing capability for fifth-generation systems, featuring stealth, supersonic speed, and networked warfare, which is driving modernization across many nations. Improvements in electronic warfare, as well as bases that will leverage artificial intelligence to enhance mission effectiveness and survivability, are also enablers. As geopolitical threats evolve and tensions escalate, can expect to see acquisitions of fighter aircraft that will redefine defense roles and further justify continued investments in air warfighting and support capabilities.

For instance, in July 2024, Latvia and Estonia finalized a joint procurement exceeding USD 1.17 billion (EUR1 billion) to acquire IRIS-T SLM air defense systems and TRML-4D radars under the European Sky Shield Initiative. Diehl Defense GmbH & Co. KG and Hensoldt AG supply and integrate the systems, enhancing Baltic airspace surveillance and missile defense capabilities.

Air Force Leads Global Market Demand for Air-Based Defense Equipment

The Air Force continues to spark global interest and demand for its air-based defense equipment, underscoring its critical role in any modern battlefield. With growing spending on capabilities, including advanced fighter aircraft, unmanned aerial systems, and integrated air defence capabilities, air forces are emphasizing rapid response, precision engagement, and multi-domain interoperability. This rise is supported by new threats and advances in technology, notably hypersonic weapons and contested airspace, prompting the need for modernization, as many countries are working to improve their aerial capabilities and situational awareness. The growing air-based defense equipment market is here to stay, with air forces influencing procurement initiatives and technological development in the global defense landscape.

For instance, in January 2024, Raytheon, an RTX Corporation business, and the U.S. Air Force Research Laboratory successfully tested the CHIMERA high-power microwave system at White Sands Missile Range. The system demonstrated end-to-end fire control and sustained tracking of multiple airborne targets using directed energy.

Asia-Pacific Dominates the Air-Based Defense Equipment Market Size

The Asia-Pacific region is leading the air-based defense equipment industry due to increasing defense budgets, geopolitical tensions, and significant military modernization across the region. India, China, Japan, and South Korea have all taken aggressive approaches to investing in advanced, overarching air platforms, integrated air defense systems, and enhanced platforms, including artificial intelligence, hypersonic weapons systems, and unmanned systems. The ongoing territorial disputes and evolving security developments are driving rapid procurement and technological innovation, while local defense industrial policies are adapting to support the regional security environment. This regional activity is reshaping the global defense space, as the Asia-Pacific is being propelled to the forefront of next-generation air-based capability development, with sustained market growth expected to continue.

For instance, in August 2024, India and Japan deepen their defense ties through co-development initiatives, including advanced naval technologies such as the "Unicorn Masts" system. This marks a significant shift as Japan eases constitutional constraints,

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enabling broader collaboration in high-tech defense platforms. The partnership reflects a strategic counterbalance to regional threats and underscores growing Indo-Pacific security cooperation.

Impact of U.S. Tariffs on Global Air-Based Defense Equipment Market

- Supply Chain Interruption: Duty charges on imported parts, especially for parts sourced from China, Mexico, and Canada, are complicating globally integrated supply chains and leading to increases in lead time and manufacturing cost.
- Cost Inflation: Defense companies are experiencing input cost increases for raw materials and subassemblies and are either using alternative suppliers or passing along price increases to government contracts.
- Research and Development Constraints: Increased costs may undercut internal research and development synergies and slow the pace of innovation at both advanced aerial systems and the elements of integrated defense.

Key Players Landscape and Outlook

The air-defense space comprises a mix of established Defense Integrators and agile innovators in one of the fastest-moving markets. Current trends in the air-defense market include increased integration, modularity, multi-domain capabilities, interoperability, digital engineering, advanced technologies (e.g., AI, electronic warfare, hypersonic defense), enhanced survivability, and shorter development cycles. The outlook is favorable due to increasing budgets, dissipating threat environments, and demand for new and next-generation air platforms. Competition will intensify in the air-defense space, and many companies are collaborating on development partnerships, investing in R&D, and implementing flexible production & manufacturing strategies to stay at the forefront of technological advancements while maintaining a rapid pace of R&D to meet the operational requirements of modern air forces.

For instance, in August 2023, the U.S. Air Force and Army collaborated on cost-effective, distributed air defense solutions tailored for the Indo-Pacific's dispersed and contested environments. This joint effort addresses the challenge of defending smaller, austere air bases against missile threats, moving beyond reliance on large, expensive systems like Patriot and THAAD.

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