

Global Electronic Warfare Market Assessment, By Capability Type [Electronic Attack, Electronic Protection, Electronic Support], By Technology [RF-based Systems, Infrared and Optical, Cyber-Electronic Integration], By Platform [Land-Based Systems, Naval Systems, Airborne Systems], By Region, Opportunities and Forecast, 2018-2032F

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Report description:

Global electronic warfare market is projected to witness a CAGR of 9.90% during the forecast period 2025-2032, growing from USD 14.55 billion in 2024 to USD 30.95 billion in 2032. The electronic warfare market is driven by intensifying geopolitical tensions and the growing need for the electronic domain to assert electromagnetic spectrum dominance. National defense forces are making significant investments in improving Air, Land, Sea, and Space capabilities with advanced electronic systems that enable electronic attack, protection, and support. Furthermore, advancements in artificial intelligence, machine learning, and cognitive electronic warfare systems are enhancing organizations' ability to achieve autonomous, real-time threat identification and response capabilities. As our modern warfare continues to evolve into a more digitized and contested environment, electronic warfare is becoming a priority in any organization's strategic initiatives. The integration of electronic warfare systems into multi-domain operations is transforming the organization's overall defense concept, as it strives to ensure survivability, mission success, and superiority in an increasingly complex operational environment.

For instance, in June 2025, SRC Aus Pty Ltd. partnered with Defense Trailblazer to accelerate the development of advanced electronic warfare support systems through the Trailblazer Electronic Warfare Support System (TESS) project. The initiative focuses on AI-enabled spectrum warfare solutions, adaptive sensors, and radar signal processing to enhance sovereign defense capabilities.

Cyber and Network-Centric Warfare Support the Global Electronic Warfare Market Expansion

Cyber warfare and network-centric warfare are two major catalysts responsible for driving the electronic warfare (EW) market.

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Because modern militaries operate beyond traditional constructs of physical territory, interconnected systems, and real-time synchronized fighting, the protection and dominance of the electromagnetic spectrum are paramount. The importance of EW systems has now extended beyond protecting tactical communications to degrading targeted networks and re-establishing situational awareness, thereby dictating operations. The combination of cyber capabilities with EW technologies is revolutionizing defense by enabling adaptive jamming and autonomous threat identification, as well as providing adversary-proof signal management. These combined capabilities will continue to evolve and modify defense measures. Still, a range of viable EW options will emerge, particularly given the model of multi-domain operations, as well as future investments in spectrum warfare technologies across air, land, sea, and space domains.

For instance, in June 2025, China unveiled the J-15DT, a carrier-based electronic warfare variant of the Shenyang J-15, signaling a significant step in modernizing its naval EW capabilities. Designed for catapult-assisted launch, the J-15DT mirrors the role of the U.S. Navy's EA-18G Growler, offering escort jamming and anti-radiation strike support.

Strategic Alliances Among Firms Drive Electronic Warfare Market Growth

The electronic warfare (EW) market is being propelled forward by strategic alliances among defense companies. By consolidating skillsets in signal processing, information/data science, artificial intelligence (AI) investment, and spectrum management, companies can innovate EW systems that are faster (more agile) and scalable across the complexity of the future operating environment (for example, multi-domain operations). Such accelerated innovation cycles enable companies to mitigate development risk while also accelerating the potential for operational deployment. In addition, by working together as joint ventures, companies can access emerging technologies, markets, opportunities, and expertise, thereby enhancing sovereign and export capabilities. As evolving and unpredictable threats and increasingly complex operational environments emerge, these partnerships are essential to support the requirements of next-generation electronic warfare solutions, ensuring tactical advantage and mission success.

For instance, in March 2025, Raytheon Australia Pty Ltd. unveiled the Electronic Warfare Tactical Engagement (EWTE) vehicle, developed at its Mawson Lakes facility in collaboration with REDARC Defense & Space Pty Ltd. The custom-built vehicle enables real-time testing of advanced electronic warfare technologies, including signal interception and jamming, in mobile environments.

Electronic Attack (EA) Dominates the Electronic Warfare Market Share

Electronic Attack (EA), a segment of the Electronic Warfare (EW) market, has outpaced all other segments and is emerging as the dominant and preferred segment in EW due to a growing need to disrupt, deceive, or deny an adversary's electronic systems. EA includes a suite of capabilities, including radar jamming, communications jamming, direct energy, and spoofing capabilities. EW threats are becoming increasingly complex and heavily spectrum-reliant, moving toward offensive spectrum operations. Developing capabilities to disable enemy radar, enemy communications, and targeting systems is vital to mission success. EA capability and technology investment, as well as development, will continue to rise, solidifying EA as a core aspect of future multi-domain warfare.

For instance, in June 2025, Israel Aerospace Industries Ltd. (IAI) unveiled the Scorpius electronic warfare system, capable of disrupting multiple aerial and ground threats using focused electromagnetic beams. Developed by IAI's ELTA Systems Ltd., Scorpius can detect and neutralize radar, navigation, and communication systems without emitting detectable signals.

North America Dominates the Electronic Warfare Market

North America remains at the forefront of the electronic warfare (EW) market. The region's cutting-edge defense infrastructure, year-on-year commitment to research and development investment, and early adoption of next-generation EW technologies continue to propel its vector to become a leader in the global EW innovation space. In the past four years, North America has implemented a multi-domain operations strategy and its emphasis on electromagnetic spectrum superiority has provided it with the impetus to lead the global field of EW development and technologies. The level of collaboration between the government, defense contractors, and research and academic institutions is crucial in rapidly implementing EW capabilities onto the battlefield. North America's leadership position in EW is supported by its approach to modernization programs and a broad industrial base, ensuring that, when deciding, it can set the tone on electronic warfare capabilities globally.

For instance, in March 2025, BAE Systems Inc. reinforced its leadership in electronic warfare by delivering integrated systems that provide electronic support, protection, and attack across multi-domain operations. Its EW technologies feature broad bandwidth, rapid threat detection, and advanced signal processing, supporting over a hundred military platforms globally.

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Impact of U.S. Tariffs on Global Electronic Warfare Market

U.S. tariffs have significantly altered the global electronic warfare (EW) market by disrupting supply chains, increasing production costs, and accelerating the adoption of sourcing strategies. Tariffs on key components-semiconductors and RF, as well as rare earth materials-resulted in delays in procurement and required companies to redesign systems using domestic or trade-accepted substitutes. While these restrictions delayed project timing and led to projections that were over budget, they also presented an opportunity for domestic innovation, strategic reshoring, and greater regional alliances. Specifically, the U.S. defense procurement strategies for Electronic Support (ES) and Electronic Attack (EA) systems have necessarily changed and resulted in a heightened demand for sovereign EW capabilities.

Key Players Landscape and Outlook

The electronic warfare (EW) market is evolving within a complex ecosystem of traditional defense contractors, nimble technology companies, and new entrants. Each of these participants incorporates AI, machine learning, and cognitive signal processing into their EW systems to develop capabilities in electronic attack, electronic support, and electronic protection. It will be interesting to see how the EW landscape changes if acquisition players are vertically integrated. As we look ahead, the future appears bright as geopolitical conflicts, spectrum crowding, and digital battlefield requirements will continue to provide investment opportunities. Acquisition priorities will reflect the shift to modular and/or software-defined systems that provide adaptability, redundancy, and rapid response to threats in increasingly complex and contested electromagnetic environments.

For instance, in June 2025, Thales Group unveiled a lightweight, remotely operated electronic warfare payload designed for deployment on small drones, enhancing frontline electromagnetic intelligence capabilities. The system, developed following a proof-of-concept awarded by France's Defense Innovation Agency (AID), enables autonomous detection and geolocation of radio signals without active emissions.

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*Companies mentioned above DO NOT hold any order as per market share and can be changed as per information available during research work.

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