

Counter-UAS Systems Market by Solution (Drone Detection, Tracking & Identification, C2, UAS Mitigation & Neutralization), by End-User (Commercial, Defense, Government & Law Enforcement), Deployment, Range, Technology and Region - Global Forecast to 2030

Market Report | 2025-10-29 | 445 pages | MarketsandMarkets

AVAILABLE LICENSES:

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

Report description:

The counter-unmanned air systems (C-UAS) market is estimated to be USD 6.64 billion in 2025. It is projected to reach USD 20.31 billion by 2030, at a CAGR of 25.1%. The need for radar systems, RF sensors, and command-and-control units to counter drone threats accelerates market growth. Defense modernization efforts and the demand for secure, high-speed data and power transmission in contested airspace remain key growth drivers. C4ISR integrations, electronic warfare systems, and counter-drone solutions within multi-layer defense frameworks further advance the adoption of compact, high-performance systems. Increasing global defense budgets and rising investments in AI-enabled threat detection and autonomous engagement technologies reinforce the demand for ruggedized and miniaturized solutions to ensure reliable performance across multi-domain C-UAS operations.

<https://mnmimg.marketsandmarkets.com/Images/counter-cuas-systems-market-img-overview.webp>

"The conventional segment is projected to account for a larger share than the AI-powered segment in the counter-unmanned air systems (C-UAS) market during the forecast period."

By technology, the conventional segment is projected to account for a larger share than the AI-powered segment in the counter-unmanned air systems (C-UAS) market during the forecast period. The segment's growth is due to conventional systems being widely deployed across the defense and government sectors for perimeter protection, base security, and border surveillance. They combine radar, EO/IR sensors, and RF jammers in field-proven architectures, offering reliability and ease of integration. Defense agencies prefer conventional C-UAS units due to their cost-effectiveness, scalability, and compatibility with

Scotts International. EU Vat number: PL 6772247784

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

www.scotts-international.com

existing command-and-control infrastructures, sustaining their market dominance over the forecast period.

"The handheld segment is projected to be the faster-growing segment than the ground-based segment in the counter-unmanned air systems (C-UAS) market during the forecast period."

By deployment, the handheld segment is projected to be the faster-growing segment than the ground-based segment during the forecast period. This projection can be attributed to the increasing demand for handheld systems from law enforcement, border patrol units, and security agencies for portable, easy-to-operate anti-drone solutions. These lightweight jamming guns and portable RF disruptors allow rapid response during drone incursions in urban and tactical environments. Their operational flexibility, low cost, and growing adoption of public safety and event protection are accelerating their deployment worldwide.

"North America is projected to be the fastest-growing market in the counter-unmanned air systems (C-UAS) market during the forecast period."

North America is projected to be the fastest-growing market in the counter-unmanned air systems (C-UAS) market, driven by substantial government investments in counter-drone R&D programs, rising threat levels from unauthorized UAVs, and frequent trials under the US Department of Defense and Department of Homeland Security. The region hosts several leading C-UAS manufacturers and integrators developing AI-enabled detection and directed-energy solutions. Moreover, the growing civil adoption of C-UAS systems across airports, power plants, and critical infrastructure further supports regional market expansion.

Breakdown of Primaries

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

-□By Company Type: Tier 1 - 40%; Tier 2 - 30%; and Tier 3 - 30%

-□By Designation: Directors - 20%; Managers - 10%; and Others - 70%

-□By Region: Asia Pacific - 40%; Europe - 20%; North America - 20%; Middle East - 10%; and Rest of the World - 10%

RTX (US), Lockheed Martin Corporation (US), Elbit Systems Ltd. (Israel), Northrop Grumman (US), and RAFAEL Advanced Defense Systems Ltd. (Israel) are some of the leading players operating in the counter-unmanned air systems (C-UAS) market.

Research Coverage

The study covers the counter-unmanned air systems (C-UAS) market across various segments and subsegments. It aims to estimate this market's size and growth potential across different segments based on solution, range, deployment, technology, end-user, 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 with information on the closest approximations of the revenue numbers for the overall counter-unmanned air systems (C-UAS) market and its subsegments. The report covers the entire counter-unmanned air systems (C-UAS) market ecosystem. The report will help stakeholders understand the competitive landscape and gain more insights to position their businesses better and plan suitable go-to-market strategies. It will also help stakeholders understand the market's pulse and provide them with information on key market drivers, restraints, challenges, and opportunities.

The report provides insights into the following pointers:

- Market Dynamics: Analysis of key growth drivers (Shift to integrated air and missile defense alignment, rising threat from drone swarms and asymmetric warfare, enterprise-grade C2/fusion replacing point solutions), restraints (legal authority and spectrum constraints in civil airspace and critical materials, critical materials and export-control dependencies), opportunities (IAMD-ready adapters and common-architecture compliance, scalable non-kinetic defeat systems), challenges (Proving effectiveness and safety of emerging effectors in-theater, supply chain resilience for EO/IR, power electronics, and lasers)
- Product Development: In-depth analysis of product innovation/development by companies across various regions
- Market Development: Comprehensive information about lucrative markets across varied regions
- Market Diversification: Exhaustive information about new solutions, untapped geographies, recent developments, and

Scotts International. EU Vat number: PL 6772247784

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

www.scotts-international.com

investments in the counter-unmanned air systems (C-UAS) market

- Competitive Assessment: In-depth assessment of market share, growth strategies, and product offerings of leading players like market RTX (US), Lockheed Martin Corporation (US), Elbit Systems Ltd. (Israel), Northrop Grumman (US), and RAFAEL Advanced Defense Systems Ltd. (Israel) in the counter-unmanned air systems (C-UAS) market

Table of Contents:

1	INTRODUCTION	42
1.1	STUDY OBJECTIVES	42
1.2	MARKET DEFINITION	42
1.3	STUDY SCOPE	43
1.3.1	MARKET SEGMENTATION & REGIONAL SCOPE	43
1.3.2	INCLUSIONS & EXCLUSIONS	43
1.4	YEARS CONSIDERED	44
1.5	CURRENCY CONSIDERED	44
1.6	STAKEHOLDERS	45
2	EXECUTIVE SUMMARY	46
2.1	KEY INSIGHTS AND MARKET HIGHLIGHTS	46
2.2	DISRUPTIVE TRENDS SHAPING MARKET	47
2.3	HIGH-GROWTH SEGMENTS AND EMERGING FRONTIERS	48
2.4	SNAPSHOT: GLOBAL MARKET SIZE, GROWTH RATE, AND FORECAST	49
3	PREMIUM INSIGHTS	50
3.1	ATTRACTIVE OPPORTUNITIES FOR PLAYERS IN COUNTER-UNMANNED AIRCRAFT SYSTEMS (C-UAS) MARKET	50
3.2	COUNTER-UNMANNED AIRCRAFT SYSTEMS (C-UAS) MARKET, BY RANGE	50
3.3	COUNTER-UNMANNED AIRCRAFT SYSTEMS (C-UAS) MARKET, BY TECHNOLOGY	51
3.4	COUNTER-UNMANNED AIRCRAFT SYSTEMS (C-UAS) MARKET, BY MILITARY & DEFENSE END USER	51
3.5	COUNTER-UNMANNED AIRCRAFT SYSTEMS (C-UAS) MARKET, BY DEPLOYMENT	52
3.6	COUNTER-UNMANNED AIRCRAFT SYSTEMS (C-UAS) MARKET, BY SOLUTION	52
4	MARKET OVERVIEW	53
4.1	INTRODUCTION	53
4.2	MARKET DYNAMICS	53
4.2.1	DRIVERS	54
4.2.1.1	Shift toward integrated air and missile defense alignment	54
4.2.1.2	Enterprise-grade C2/fusion replacing point solutions	54
4.2.1.3	Rising threat density and mixed-domain salvos	54
4.2.1.4	Magazine depth and cost-per-engagement economics	54
4.2.1.5	Maturation of directed energy and protocol-aware defeat	55
4.2.2	RESTRAINTS	55
4.2.2.1	Legal authority and spectrum constraints in civil airspace	55
4.2.2.2	Critical materials and export-control dependencies	55
4.2.3	OPPORTUNITIES	56
4.2.3.1	IAMD-ready adapters and common-architecture compliance	56
4.2.3.2	Scalable non-kinetic defeat systems	56
4.2.3.3	Counter-swarm toolkits and autonomy-resilient sensing	56
4.2.3.4	Maritime and expeditionary C-UAS expansion	56
4.2.3.5	Training, red-team swarms, and managed detection services	57

Scotts International. EU Vat number: PL 6772247784

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

www.scotts-international.com

4.2.3.6	Mission data, analytics, and model sustainment as subscription	57
4.2.4	CHALLENGES	57
4.2.4.1	Proving effectiveness and safety of emerging effectors in-theater	57
4.2.4.2	Supply chain resilience for EO/IR, power electronics, and lasers	58
4.2.4.3	Assured interoperability and cyber hardening across C2 ecosystems	58
4.3	UNMET NEEDS AND WHITE SPACES	58
4.3.1	RISE OF NUISANCE ACTIVITY	58
4.3.2	INTELLIGENCE, SURVEILLANCE, AND RECONNAISSANCE (ISR) THREATS	59
4.3.3	PAYLOAD DELIVERY FAILURES	59
4.4	INTERCONNECTED MARKET AND CROSS-SECTOR OPPORTUNITIES	60
4.4.1	COUNTER-DRONES IN INTEGRATED SOLDIER SYSTEMS	60
4.4.2	COUNTER-DRONES FOR LITTORAL VESSELS	60
4.4.3	COUNTER-DRONES FOR HEAVY ARMOR AND VEHICLES	61
4.5	STRATEGIC MOVES BY TIER 1, 2, AND 3 PLAYERS	61
5	TECHNOLOGICAL ADVANCEMENTS, AI-DRIVEN IMPACT, PATENTS, INNOVATIONS, AND FUTURE APPLICATIONS	62
5.1	KEY EMERGING TECHNOLOGIES	62
5.1.1	KU/X-BAND LOW-RCS 3D RADARS WITH STARING ARRAYS	62
5.1.2	CRPA ANTI-JAM FRONT ENDS AND DISCIPLINED OSCILLATORS	62
5.2	COMPLEMENTARY TECHNOLOGIES	63
5.2.1	BEAM DIRECTORS, POWER SUBSYSTEMS, AND THERMAL PACKS FOR DEWS	63
5.2.2	MARITIME HARDENING KITS FOR SENSORS AND DEW	63
5.2.3	MWIR/LWIR SENSOR CORES AND GERMANIUM-ALTERNATIVE OPTICS	63
5.3	TECHNOLOGY ROADMAP	64
5.4	PATENT ANALYSIS	66
5.5	FUTURE APPLICATIONS	68
5.6	IMPACT OF AI/GEN AI ON COUNTER-UNMANNED AIRCRAFT SYSTEMS (C-UAS) MARKET	70
5.6.1	TOP USE CASES AND MARKET POTENTIAL	71
5.6.2	BEST PRACTICES IN C-UAS	71
5.6.3	CASE STUDIES OF IMPLEMENTATION OF GEN AI IN C-UAS	72
5.6.4	INTERCONNECTED ADJACENT ECOSYSTEM AND IMPACT ON MARKET PLAYERS	72
5.6.5	CLIENTS' READINESS TO ADOPT GEN AI	73
5.7	SUCCESS STORIES AND REAL-WORLD APPLICATIONS	73
5.7.1	RAFAEL ADVANCED DEFENSE SYSTEMS - IRON BEAM C-UAS INTEGRATION	74
5.7.2	HENSOLDT - MULTI-SENSOR FUSION IN XPELLER COUNTER-DRONE SYSTEM	74
5.7.3	LITEYE SYSTEMS - TACTICAL C-UAS FOR MOBILE FORCE PROTECTION	74
6	INDUSTRY TRENDS	75
6.1	ECOSYSTEM ANALYSIS	75
6.1.1	SYSTEM INTEGRATORS & PRIME CONTRACTORS	75
6.1.2	SPECIALIZED C-UAS TECHNOLOGY PROVIDERS	75
6.1.3	SENSOR, RADAR, AND SUBSYSTEM MANUFACTURERS	75
6.2	VALUE CHAIN ANALYSIS	77
6.2.1	RESEARCH & DEVELOPMENT	77
6.2.2	SENSOR & MATERIAL DEVELOPMENT	77
6.2.3	SUBSYSTEM/PRODUCT MANUFACTURING	78
6.2.4	SYSTEM ASSEMBLY & INTEGRATION	78
6.2.5	POST-SALES SERVICE	78
6.3	SUPPLY CHAIN ANALYSIS	79

Scotts International. EU Vat number: PL 6772247784

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

www.scotts-international.com

6.3.1	COMPONENT SUPPLIERS	79
6.3.2	SYSTEM INTEGRATORS & OPERATORS	79
6.3.3	C-UAS SYSTEM MANUFACTURERS	79
6.3.4	END USERS	79
6.4	IMPACT OF 2025 US TARIFF	80
6.4.1	KEY TARIFF RATES	80
6.4.2	PRICE IMPACT ANALYSIS	81
6.4.3	IMPACT ON COUNTRY/REGION	82
6.4.3.1	US	82
6.4.3.2	Europe	82
6.4.3.3	Asia Pacific	83
6.4.4	IMPACT ON END-USE INDUSTRIES	83
6.4.4.1	Military & defense	83
6.4.4.2	Commercial & civil	83
6.4.4.3	Government & law enforcement	84
6.5	TRADE ANALYSIS	84
6.5.1	IMPORT SCENARIO (HS CODE 852610)	84
6.5.2	EXPORT SCENARIO (HS CODE 852610)	86
6.6	KEY CONFERENCES & EVENTS, 2025-2026	88
6.7	TOTAL COST OF OWNERSHIP	89
6.8	INVESTMENT AND FUNDING SCENARIO	90
6.9	OPERATIONAL DATA	91
6.10	PRICING ANALYSIS	92
6.10.1	AVERAGE SELLING PRICE OF C-UAS, BY KEY PLAYER, 2024	92
6.10.1.1	Short range (< 1 KM)	92
6.10.1.2	Tactical range (1-5 KM)	93
6.10.1.3	Medium Range (6-20 KM)	93
6.10.1.4	Long Range (21-50 KM)	93
6.10.1.5	Extended Range (> 50 KM)	94
6.10.2	AVERAGE SELLING PRICE TREND OF C-UAS, BY REGION	94
6.11	MACROECONOMIC OUTLOOK	95
6.11.1	NORTH AMERICA	95
6.11.2	EUROPE	96
6.11.3	ASIA PACIFIC	96
6.11.4	MIDDLE EAST	96
6.11.5	REST OF THE WORLD	96
6.12	KEY REGULATIONS	97
6.12.1	NORTH AMERICA	97
6.12.2	EUROPE	97
6.12.3	ASIA PACIFIC	97
6.12.4	MIDDLE EAST	97
6.12.5	REST OF THE WORLD	98
6.13	IMPACT OF MEGATRENDS	98
6.13.1	5G AND EDGE-ENABLED C-UAS NETWORKS	98
6.13.2	SPACE-BASED, HIGH-ALTITUDE ISR INTEGRATION	99
6.13.3	DIGITAL TWIN AND SIMULATION-DRIVEN C-UAS DESIGN	99
7	REGULATORY LANDSCAPE	100

Scotts International. EU Vat number: PL 6772247784

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

www.scotts-international.com

7.1	REGIONAL REGULATIONS AND COMPLIANCE	100
7.1.1	REGULATORY BODIES, GOVERNMENT AGENCIES, AND OTHER ORGANIZATIONS	100
7.1.2	INDUSTRY STANDARDS	102
8	CUSTOMER LANDSCAPE & BUYER BEHAVIOR	105
8.1	DECISION-MAKING PROCESS	105
8.2	BUYER STAKEHOLDERS AND BUYING EVALUATION CRITERIA	106
8.2.1	KEY STAKEHOLDERS IN BUYING PROCESS	106
8.2.2	BUYING EVALUATION CRITERIA	107
8.3	ADOPTION BARRIERS & INTERNAL CHALLENGES	108
8.4	UNMET NEEDS FROM VARIOUS END-USE INDUSTRIES	110
8.5	MARKET PROFITABILITY	110
8.5.1	REVENUE POTENTIAL	111
8.5.2	COST DYNAMICS	111
8.5.3	MARGIN OPPORTUNITIES FOR END USERS	111
9	COUNTER-UNMANNED AIRCRAFT SYSTEMS (C-UAS) MARKET, BY SOLUTION (MARKET SIZE & FORECAST TO 2030 - IN USD MILLION)	112
9.1	INTRODUCTION	113
9.2	DRONE DETECTION, TRACKING, AND IDENTIFICATION	114
9.2.1	MULTI-SENSOR FUSION AND AI-BASED ANALYTICS TO TRANSFORM DRONE DETECTION AND IDENTIFICATION ACCURACY	114
9.2.2	DRONE DETECTION RADAR	115
9.2.2.1	Ku-band	116
9.2.2.2	X-band	116
9.2.2.3	C-band	117
9.2.2.4	S-band	117
9.2.2.5	L-band	117
9.2.2.6	Other frequency bands	117
9.2.3	PASSIVE RF ANALYZERS	118
9.2.4	COUNTER-DRONE ACOUSTIC SENSORS	118
9.2.4.1	Arrays	119
9.2.4.2	Microphones	119
9.2.5	ELECTRO-OPTICAL AND INFRARED CAMERAS	119
9.2.5.1	Multispectral	120
9.2.5.2	Hyperspectral	120
9.2.6	MULTI-SENSOR SYSTEMS	120
9.3	COMMAND & CONTROL (C2)	120
9.3.1	EVOLVING C2 ARCHITECTURES TO ENABLE FASTER, CONNECTED, AND MORE RESILIENT COUNTER-DRONE OPERATIONS	120
9.3.2	COUNTER-UAS COMMAND & CONTROL SYSTEM	121
9.3.3	INTEGRATED C2 SYSTEM	121
9.4	UAS MITIGATION & NEUTRALIZATION	122
9.4.1	INTEGRATION OF LAYERED MITIGATION SYSTEMS TO ENHANCE DRONE NEUTRALIZATION EFFICIENCY ACROSS THREAT ENVIRONMENTS	122
9.4.2	HARD KILL	123
9.4.2.1	Anti-drone guns	124
9.4.2.2	Intercept drones	124
9.4.2.3	C-UAS kinetic missiles	124
9.4.2.4	Anti-swarm munition	125
9.4.2.5	High-power microwave anti-drone systems	125

Scotts International. EU Vat number: PL 6772247784

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

www.scotts-international.com

9.4.2.6	High-energy lasers	125
9.4.2.7	Others	125
9.4.3	SOFT KILL/ELECTRONIC COUNTERMEASURES	126
9.4.3.1	Anti-FPV RF jamming technology	126
9.4.3.2	Global navigation satellite system (GNSS) jamming	127
9.4.3.3	Spoofing, protocol manipulation, and cyber-takeover systems	127
9.5	SERVICES	127
9.5.1	LIFECYCLE SERVICE MODELS TO STRENGTHEN RELIABILITY AND SUSTAINMENT	127
9.5.2	SOFTWARE UPGRADE	128
9.5.3	HARDWARE UPGRADE	128
9.5.4	MAINTENANCE & SUPPORT	129
9.5.5	INSTALLATION & INTEGRATION SERVICES	129
10	COUNTER-UNMANNED AIRCRAFT SYSTEMS (C-UAS) MARKET, BY END USER (MARKET SIZE & FORECAST TO 2030 - IN USD MILLION)	130
10.1	INTRODUCTION	131
10.2	COMMERCIAL & CIVIL	132
10.2.1	RIISING DRONE MISUSE ACROSS CIVIL INFRASTRUCTURE TO ACCELERATE DEMAND FOR C-UAS SOLUTIONS IN PRIVATE SECTOR	132
10.2.2	PUBLIC VENUES	133
10.2.3	CRITICAL INFRASTRUCTURE	133
10.2.3.1	Stadiums & arenas	134
10.2.3.2	Airports	134
10.2.3.3	Prisons	134
10.2.3.4	Power plants	135
10.2.3.5	Oil & gas fields	135
10.2.3.6	Transportation hubs	135
10.2.3.7	Data centers	135
10.2.3.8	Research & development centers	135
10.2.3.9	Corporate & industrial facilities	135
10.3	MILITARY & DEFENSE	136
10.3.1	DEFENSE MODERNIZATION AND ASYMMETRIC THREATS TO ACCELERATE C-UAS ADOPTION ACROSS ARMED SERVICES	136
10.3.2	ARMED FORCES	137
10.3.3	AIR FORCE	137
10.3.4	NAVY	137
10.3.5	OTHER SPECIAL FORCES	137
10.4	GOVERNMENT & LAW ENFORCEMENT	138
10.4.1	GROWING CIVIL AIRSPACE INTRUSIONS AND PUBLIC SECURITY RISKS TO DRIVE ADOPTION OF C-UAS	138
10.4.2	NATIONAL/FEDERAL POLICE	139
10.4.3	CIVILIAN INTELLIGENCE & SECURITY AGENCIES	139
10.4.4	PARAMILITARY POLICE	139
11	COUNTER-UNMANNED AIRCRAFT SYSTEMS (C-UAS) MARKET, BY DEPLOYMENT (MARKET SIZE & FORECAST TO 2030 - IN USD MILLION)	140
11.1	INTRODUCTION	141
11.2	GROUND-BASED	142
11.2.1	NEED TO STRENGTHEN CONTINUOUS PROTECTION OF STRATEGIC AND CIVIL INFRASTRUCTURE TO DRIVE MARKET	142
11.2.2	FIXED	143
11.2.3	MOBILE	143

Scotts International. EU Vat number: PL 6772247784

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

www.scotts-international.com

?

11.3 □ HANDHELD □ 143

11.3.1 □ FRONTLINE FORCES INCREASINGLY RELY ON PORTABLE COUNTER-DRONE DEVICES FOR RAPID THREAT NEUTRALIZATION □ 143

12 □ COUNTER-UNMANNED AIRCRAFT SYSTEMS (C-UAS) MARKET, BY RANGE (MARKET SIZE & FORECAST TO 2030 - IN USD MILLION) □ 144

12.1 □ INTRODUCTION □ 145

12.2 □ SHORT RANGE (< 1 KM) □ 146

12.2.1 □ URBAN AND CRITICAL SITE SECURITY TO ACCELERATE ADOPTION OF COMPACT SHORT-RANGE COUNTER-DRONE SYSTEMS □ 146

12.3 □ TACTICAL RANGE (1-5 KM) □ 146

12.3.1 □ MILITARY AND LAW ENFORCEMENT AGENCIES EXPAND TACTICAL-RANGE C-UAS CAPABILITIES FOR MOBILE FIELD OPERATIONS □ 146

12.4 □ MEDIUM RANGE (6-20 KM) □ 147

12.4.1 □ INCREASE IN BORDER SURVEILLANCE AND MILITARY BASE PROTECTION PROGRAMS TO DRIVE DEMAND □ 147

12.5 □ LONG RANGE (21-50 KM) □ 147

12.5.1 □ INCREASING CROSS-BORDER DRONE INTRUSIONS TO PROPEL INVESTMENTS IN LONG-RANGE COUNTER-DRONE PLATFORMS □ 147

12.6 □ EXTENDED RANGE (> 50 KM) □ 147

12.6.1 □ STRATEGIC DEFENSE MODERNIZATION TO SPUR DEVELOPMENT OF EXTENDED-RANGE C-UAS NETWORKS □ 147

13 □ COUNTER-UNMANNED AIRCRAFT SYSTEMS (C-UAS) MARKET, BY TECHNOLOGY (MARKET SIZE & FORECAST TO 2030 - IN USD MILLION) □ 149

13.1 □ INTRODUCTION □ 150

13.2 □ CONVENTIONAL □ 151

13.2.1 □ UPGRADES IN RADAR AND RF TECHNOLOGIES SUSTAIN GROWTH OF CONVENTIONAL COUNTER-DRONE SOLUTIONS □ 151

13.3 □ AI-POWERED □ 151

13.3.1 □ AI-POWERED C-UAS PLATFORMS TRANSFORM THREAT DETECTION, DECISION-MAKING, AND OPERATIONAL AUTONOMY □ 151

14 □ COUNTER-UNMANNED AIRCRAFT SYSTEMS (C-UAS) MARKET, BY REGION (MARKET SIZE & FORECAST TO 2030 - IN USD MILLION) □ 153

14.1 □ INTRODUCTION □ 154

14.2 □ NORTH AMERICA □ 154

14.2.1 □ PESTLE ANALYSIS □ 155

14.2.2 □ US □ 164

14.2.2.1 □ Increased security incidents to drive investment in defense and homeland security programs □ 164

14.2.3 □ CANADA □ 165

14.2.3.1 □ Increase in innovation and defense policies to drive expansion of Canadian C-UAS initiatives □ 165

14.3 □ EUROPE □ 167

14.3.1 □ PESTLE ANALYSIS □ 167

14.3.2 □ UK □ 177

14.3.2.1 □ Rising airspace security incidents to drive C-UAS expansion □ 177

14.3.3 □ GERMANY □ 178

14.3.3.1 □ Layered defense deployment to strengthen country's C-UAS posture □ 178

14.3.4 □ FRANCE □ 180

14.3.4.1 □ Repeated drone incursions to drive country's C-UAS strategy □ 180

14.3.5 □ ITALY □ 182

14.3.5.1 □ Drone-related incidents to drive Italy's C-UAS reinforcement □ 182

14.3.6 □ SPAIN □ 184

Scotts International. EU Vat number: PL 6772247784

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

www.scotts-international.com

14.3.6.1	Rising drone smuggling incidents to drive market expansion	184
14.3.7	POLAND	186
14.3.7.1	Rising drone activity near Eastern frontier to drive growth	186
14.3.8	REST OF EUROPE	187
14.4	ASIA PACIFIC	189
14.4.1	PESTLE ANALYSIS	189
14.4.2	CHINA	199
14.4.2.1	Rising threats from foreign drones to drive market	199
14.4.3	JAPAN	200
14.4.3.1	National security requirements to boost coordinated counter-drone framework	200
14.4.4	AUSTRALIA	202
14.4.4.1	Rising incidents of drone threats to drive country's C-UAS development	202
14.4.5	SOUTH KOREA	204
14.4.5.1	Repeated drone incursions to create demand for C-UAS expansion	204
14.4.6	INDIA	206
14.4.6.1	Rising cross-border drone operations to strengthen India's C-UAS capabilities	206
14.4.7	REST OF ASIA PACIFIC	207
14.5	MIDDLE EAST	210
14.5.1	PESTLE ANALYSIS	211
14.5.2	GCC	220
14.5.2.1	Saudi Arabia	227
14.5.2.1.1	Rising threat of drones to drive C-UAS modernization	227
14.5.2.2	UAE	229
14.5.2.2.1	Rising drone activity to boost C-UAS expansion	229
14.5.3	ISRAEL	231
14.5.3.1	Persistent border drone incursions to spur demand for C-UAS	231
14.5.4	TURKEY	232
14.5.4.1	Evolving unmanned threats to drive country's C-UAS framework expansion	232
14.5.5	REST OF MIDDLE EAST	234
14.6	REST OF THE WORLD	241
14.6.1	PESTLE ANALYSIS	242
14.6.2	AFRICA	251
14.6.2.1	Need for national security governance to strengthen C-UAS integration	251
14.6.3	LATIN AMERICA	258
14.6.3.1	Rising border drone activities to boost market	258
15	COMPETITIVE LANDSCAPE	267
15.1	INTRODUCTION	267
15.2	KEY PLAYER STRATEGIES/RIGHT TO WIN, 2021-2025	267
15.3	REVENUE ANALYSIS, 2021-2024	269
15.4	MARKET SHARE ANALYSIS, 2024	270
15.5	BRAND COMPARISON	272
15.6	COMPANY VALUATION AND FINANCIAL METRICS	274
15.7	COMPANY EVALUATION MATRIX: KEY PLAYERS, 2024	275
15.7.1	STARS	275
15.7.2	EMERGING LEADERS	275
15.7.3	PERVASIVE PLAYERS	275
15.7.4	PARTICIPANTS	275

Scotts International. EU Vat number: PL 6772247784

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

www.scotts-international.com

15.7.5	COMPANY FOOTPRINT	277
15.7.5.1	Company footprint	277
15.7.5.2	Region footprint	278
15.7.5.3	Deployment footprint	279
15.7.5.4	End user footprint	280
15.7.5.5	Range footprint	281
15.7.5.6	Technology footprint	282
15.8	COMPANY EVALUATION MATRIX: STARTUPS/SMES, 2024	283
15.8.1	PROGRESSIVE COMPANIES	283
15.8.2	RESPONSIVE COMPANIES	283
15.8.3	DYNAMIC COMPANIES	283
15.8.4	STARTING BLOCKS	283
15.8.5	COMPETITIVE BENCHMARKING	285
15.8.5.1	List of startups/SMEs	285
15.8.5.2	Competitive benchmarking of startups/SMEs	286
15.9	COMPETITIVE SCENARIO	287
15.9.1	PRODUCT LAUNCHES & ENHANCEMENTS	287
15.9.2	DEALS	290
15.9.3	OTHER DEVELOPMENTS	298
?		
16	COMPANY PROFILES	310
16.1	KEY PLAYERS	310
16.1.1	RTX	310
16.1.1.1	Business overview	310
16.1.1.2	Products offered	311
16.1.1.3	Recent developments	312
16.1.1.3.1	Other developments	312
16.1.1.4	MnM view	313
16.1.1.4.1	Right to win	313
16.1.1.4.2	Strategic choices	313
16.1.1.4.3	Weaknesses and competitive threats	313
16.1.2	LOCKHEED MARTIN CORPORATION	314
16.1.2.1	Business overview	314
16.1.2.2	Products offered	315
16.1.2.3	Recent developments	316
16.1.2.3.1	Product launches & enhancements	316
16.1.2.3.2	Deals	316
16.1.2.3.3	Other developments	317
16.1.2.4	MnM view	317
16.1.2.4.1	Right to win	317
16.1.2.4.2	Strategic choices	317
16.1.2.4.3	Weaknesses and competitive threats	318
16.1.3	NORTHROP GRUMMAN	319
16.1.3.1	Business overview	319
16.1.3.2	Products offered	320
16.1.3.3	Recent developments	321
16.1.3.3.1	Other developments	321

Scotts International. EU Vat number: PL 6772247784

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

www.scotts-international.com

- 16.1.3.4 MnM view 322
- 16.1.3.4.1 Right to win 322
- 16.1.3.4.2 Strategic choices 322
- 16.1.3.4.3 Weaknesses and competitive threats 322
- 16.1.4 ELBIT SYSTEMS LTD 323
- 16.1.4.1 Business overview 323
- 16.1.4.2 Products offered 324
- 16.1.4.3 Recent developments 325
- 16.1.4.3.1 Product launches & enhancements 325
- 16.1.4.3.2 Other developments 326
- 16.1.4.4 MnM view 326
- 16.1.4.4.1 Right to win 326
- 16.1.4.4.2 Strategic choices 326
- 16.1.4.4.3 Weaknesses and competitive threats 327
- ?
- 16.1.5 RAFAEL ADVANCED DEFENSE SYSTEMS LTD 328
- 16.1.5.1 Business overview 328
- 16.1.5.2 Products offered 329
- 16.1.5.3 Recent developments 330
- 16.1.5.3.1 Deals 330
- 16.1.5.3.2 Other developments 330
- 16.1.5.4 MnM view 331
- 16.1.5.4.1 Right to win 331
- 16.1.5.4.2 Strategic choices 331
- 16.1.5.4.3 Weaknesses and competitive threats 331
- 16.1.6 DEDRONE BY AXON 332
- 16.1.6.1 Business overview 332
- 16.1.6.2 Products offered 332
- 16.1.6.3 Recent developments 334
- 16.1.6.3.1 Product launches & enhancements 334
- 16.1.6.3.2 Deals 335
- 16.1.7 BHARAT ELECTRONICS LIMITED (BEL) 336
- 16.1.7.1 Business overview 336
- 16.1.7.2 Products offered 337
- 16.1.7.3 Recent developments 338
- 16.1.7.3.1 Deals 338
- 16.1.7.3.2 Other developments 339
- 16.1.8 DRONESHIELD LTD 340
- 16.1.8.1 Business overview 340
- 16.1.8.2 Products offered 341
- 16.1.8.3 Recent developments 343
- 16.1.8.3.1 Product launches & enhancements 343
- 16.1.8.3.2 Deals 343
- 16.1.8.3.3 Other developments 343
- 16.1.9 AERODEFENSE 345
- 16.1.9.1 Business overview 345
- 16.1.9.2 Products offered 345

Scotts International. EU Vat number: PL 6772247784

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

www.scotts-international.com

16.1.9.3	Recent developments	346
16.1.9.3.1	Product launches & enhancements	346
16.1.9.3.2	Deals	346
16.1.9.3.3	Other developments	346
16.1.10	LEONARDO DRS	347
16.1.10.1	Business overview	347
16.1.10.2	Products offered	348
16.1.10.3	Recent developments	349
16.1.10.3.1	Product launches & enhancements	349
16.1.10.3.2	Other developments	350
16.1.11	THALES	351
16.1.11.1	Business overview	351
16.1.11.2	Products offered	352
16.1.11.3	Recent developments	353
16.1.11.3.1	Deals	353
16.1.11.3.2	Other developments	354
16.1.12	HENSOLDT AG	355
16.1.12.1	Business overview	355
16.1.12.2	Products offered	356
16.1.12.3	Recent developments	357
16.1.12.3.1	Deals	357
16.1.12.3.2	Other developments	358
16.1.13	SAAB AB	359
16.1.13.1	Business overview	359
16.1.13.2	Products offered	360
16.1.13.3	Recent developments	361
16.1.13.3.1	Product launches & enhancements	361
16.1.13.3.2	Other developments	361
16.1.14	ANDURIL INDUSTRIES	363
16.1.14.1	Business overview	363
16.1.14.2	Products offered	363
16.1.14.3	Recent developments	364
16.1.14.3.1	Other developments	364
16.1.15	DIEHL STIFTUNG & CO. KG	365
16.1.15.1	Business overview	365
16.1.15.2	Products offered	365
16.1.15.3	Other developments	366
16.1.16	ELECTRO OPTIC SYSTEMS	367
16.1.16.1	Business overview	367
16.1.16.2	Products offered	368
16.1.17	HANWHA SYSTEMS CO., LTD	369
16.1.17.1	Business overview	369
16.1.17.2	Products offered	370
16.1.17.3	Recent developments	371
16.1.17.3.1	Deals	371
16.1.17.3.2	Other developments	371
16.1.18	RHEINMETALL AG	373

Scotts International. EU Vat number: PL 6772247784

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

www.scotts-international.com

16.1.18.1	Business overview	373
16.1.18.2	Products offered	374
16.1.18.3	Recent developments	375
16.1.18.3.1	Product launches & enhancements	375
16.1.18.3.2	Other developments	376
16.1.19	EDGE GROUP PJSC	377
16.1.19.1	Business overview	377
16.1.19.2	Products offered	377
16.1.19.3	Recent developments	378
16.1.19.3.1	Product launches & enhancements	378
16.1.19.3.2	Deals	378
16.1.19.3.3	Other developments	379
16.1.20	KONGSBERG	380
16.1.20.1	Business overview	380
16.1.20.2	Products offered	381
16.1.20.3	Recent developments	382
16.1.20.3.1	Product launches & enhancements	382
16.1.20.3.2	Deals	382
16.1.20.3.3	Other developments	383
16.1.21	BAE SYSTEMS	384
16.1.21.1	Business overview	384
16.1.21.2	Products offered	385
16.1.21.3	Recent developments	386
16.1.21.3.1	Deals	386
16.1.21.3.2	Other developments	386
16.1.22	HONEYWELL INTERNATIONAL INC	387
16.1.22.1	Business overview	387
16.1.22.2	Products offered	388
16.1.22.3	Recent developments	388
16.1.22.3.1	Product launches & enhancements	388
16.1.22.3.2	Deals	389
16.1.22.3.3	Other developments	389
16.1.23	ISRAEL AEROSPACE INDUSTRIES LTD	390
16.1.23.1	Business overview	390
16.1.23.2	Products offered	391
16.1.23.3	Recent developments	391
16.1.23.3.1	Product launches & enhancements	391
16.1.23.3.2	Other developments	392
16.1.24	BLIGHTER SURVEILLANCE SYSTEMS LIMITED	393
16.1.24.1	Business overview	393
16.1.24.2	Products offered	393
16.1.24.3	Recent developments	394
16.1.24.3.1	Product launches & enhancements	394
16.1.24.3.2	Other developments	394
16.1.25	INDRA	396
16.1.25.1	Business overview	396
16.1.25.2	Products offered	397

Scotts International. EU Vat number: PL 6772247784

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

www.scotts-international.com

16.1.25.3	Recent developments	397
16.1.25.3.1	Deals	397
16.1.25.3.2	Other developments	398
16.2	OTHER PLAYERS	399
16.2.1	MY DEFENSE A/S	399
16.2.2	FORTEM TECHNOLOGIES	400
16.2.3	ROBIN RADAR SYSTEMS	401
16.2.4	AEROVIRONMENT, INC	402
16.2.5	DETECT INC	403
16.2.6	OPENWORKS	404
16.2.7	AIRBUS	405
16.2.8	SKYLOCK LTD	406
16.2.9	DZYNE	407
16.2.10	SKYSAFE	408
17	RESEARCH METHODOLOGY	409
17.1	RESEARCH DATA	409
17.1.1	SECONDARY DATA	410
17.1.1.1	Key data from secondary sources	411
17.1.2	PRIMARY DATA	411
17.1.2.1	Primary participants	411
17.1.2.2	Key data from primary sources	412
17.1.2.3	Breakdown of primary interviews	412
17.1.2.4	Insights from industry experts	413
17.2	FACTOR ANALYSIS	413
17.2.1	MACROECONOMIC AND POLICY FACTORS	413
17.2.2	INDUSTRY AND OPERATIONAL FACTORS	414
17.2.3	DEMAND-SIDE AND END USER FACTORS	414
17.2.4	QUANTITATIVE WEIGHTING AND SENSITIVITY	415
17.2.5	FACTOR-DRIVEN FORECAST IMPLICATIONS	415
17.2.6	DEMAND-SIDE INDICATORS	416
17.2.7	SUPPLY-SIDE INDICATORS	419
17.3	MARKET SIZE ESTIMATION	420
17.3.1	BOTTOM-UP APPROACH	420
17.3.1.1	Market size estimation methodology	422
17.3.2	TOP-DOWN APPROACH	423
17.4	DATA TRIANGULATION	424
17.5	RESEARCH ASSUMPTIONS	425
17.6	RESEARCH LIMITATIONS	425
17.7	RISK ASSESSMENT	426
?		
18	APPENDIX	427
18.1	LAUNDRY LIST OF COMPANIES	427
18.2	DISCUSSION GUIDE	438
18.3	KNOWLEDGESTORE: MARKETSandMARKETS' SUBSCRIPTION PORTAL	441
18.4	CUSTOMIZATION OPTIONS	443
18.5	RELATED REPORTS	443
18.6	AUTHOR DETAILS	444

Scotts International. EU Vat number: PL 6772247784

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

www.scotts-international.com

Counter-UAS Systems Market by Solution (Drone Detection, Tracking & Identification, C2, UAS Mitigation & Neutralization), by End-User (Commercial, Defense, Government & Law Enforcement), Deployment, Range, Technology and Region - Global Forecast to 2030

Market Report | 2025-10-29 | 445 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