

Electronic attack systems drive \$25 billion market

The introduction of highly valuable, next-generation fighter aircraft and naval platforms will also lead to demand for updated and upgraded EW systems.

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By [Spero News](#) 

In a new analysis, *The Market for Electronic Warfare Systems*, Forecast International is projecting that an estimated \$24.6 billion will be spent on the development and production of leading EW systems over the next 10 years.

“The rising need for the various jamming, self-protection, and electronic support measures (ESM) systems that make up the EW Systems market will result in steady production and long-term research and development well into the next decade,” said the report’s author, Andrew Dardine.

“The major systems in terms of production numbers and estimated value are the jamming systems and countermeasures systems that are being used to save lives and complete key missions in Iraq and Afghanistan,” said Dardine. Combined, the jamming and countermeasures segments have a projected 10-year value of \$4.8 billion.

As for the leading contractors in this market, the top two are not only producers of long-established EW systems, but are also in on the ground floor in the development of next-generation systems for the military platforms of tomorrow. Both Northrop Grumman and BAE Systems are poised to adapt their proven IR missile countermeasure technology to new applications in the next several years.

With its involvement in the development and production of perhaps the most important jamming program in existence, the EA-18G Growler, Northrop Grumman is the top-ranked company, with a 10-year market share of \$10.4 billion.

BAE Systems, with its production of a wide-range of EW systems for many international applications, occupies the number two spot with a market share of \$3.3 billion. The company stands a very good chance of seeing one of its established systems adapted to a wholly new, important application. Its Tactical Aircraft Directable IR Countermeasures (TADIRCM) system for the F/A-18 could emerge as one of the most important self-protection programs on the market.

Raytheon, ITT, and Lockheed Martin round out the rest of the top-five companies in this analysis. Raytheon owes its position in part to the success of such important radar warning receiver (RWR) systems as its ALR-67, for which the Navy recently awarded a

\$36.7 million production contract. ITT can attribute its ranking to the international success of its versatile, leading EW suite, the ALQ-211. Already in use by the U.S. and other nations for multiple platforms, the system, in late 2006, entered active service in Chile.

The introduction of highly valuable, next-generation fighter aircraft and naval platforms will also lead to demand for updated and upgraded EW systems. For this reason, long-term R&D programs will probably see steady funding through the next several years in the advance of full-production of key platforms. Through 2017, an estimated \$3.4 billion will be spent on the various EW development programs covered in this analysis.