

# The Market for Airborne Radar Systems 2018-2027

---



**FORECAST**  
INTERNATIONAL

Forecast International's Market Segment Analyses are sold as a **Complete Data Package**. You receive not only the Analysis and related program reports in PDF form via email, but also a complete set of supporting products that allow you to pinpoint those segments of the market that best inform your marketing strategy.

Complete Data Packages, as depicted below, are delivered via express courier and contain the following materials:



- The Market Segment Analysis, containing:
  - 10-year detailed production forecasts
  - An in-depth overview of the principal market motivators and constraints
  - Calculations of projected manufacturer market shares by units and value
- All individual supporting program reports inclusive of contractor information and program history, with detailed forecast tables and a Forecast Rationale for each program
- A CD containing the Analysis of the chosen market & supporting reports in MS® Word
- Full market segment spreadsheets in MS® Excel, which allow users to manipulate data
- A hard copy of the Analysis complete with 10-year production forecasts and a chart package
- EMarket Alerts – Online access, as well as a twice weekly e-send of breaking industry news and recent developments pertaining to your market of interest

FI's Market Segment Analyses are updated annually, making them indispensable tools for evaluating market potential. Each Market Segment Analysis identifies key growth opportunities, strategic partners, and merger & acquisition targets. What's more, key trends and critical developments are closely tracked to keep you fully up to date on market opportunities.

As an added benefit, the Complete Data Package is neatly presented in an elegant zipper case that is ideally suited for executive presentations.

# Analysis 1

## The Market for Airborne Radar Systems 2018-2027

### Table of Contents

<b>Executive Summary</b> .....	2
<b>Introduction</b> .....	3
<b>Trends</b> .....	5
<b>Competitive Environment</b> .....	18
<b>Market Statistics</b> .....	23
Table 1 - The Market for Airborne Radar Systems Unit Production by Headquarters/Company/Program 2018 - 2027 .....	29
Table 2 - The Market for Airborne Radar Systems Value Statistics by Headquarters/Company/Program 2018 - 2027 .....	42
Figure 1 - The Market for Airborne Radar Systems Unit Production 2018 - 2027 (Bar Graph) .....	59
Figure 2 - The Market for Airborne Radar Systems Value of Production 2018 - 2027 (Bar Graph) .....	59
Table 3 - The Market for Airborne Radar Systems Unit Production % Market Share by Headquarters/Company 2018 - 2027 .....	60
Table 4 - The Market for Airborne Radar Systems Value Statistics % Market Share by Headquarters/Company 2018 - 2027 .....	62
Figure 3 - The Market for Airborne Radar Systems Unit Production % Market Share 2018 - 2027 (Pie Chart) .....	65
Figure 4 - The Market for Airborne Radar Systems Value Statistics % Market Share 2018 - 2027 (Pie Chart) .....	65
<b>Conclusion</b> .....	66

\* \* \*

# The Market for Airborne Radar Systems

## Executive Summary

**Note:** This analysis defines the airborne radar market as the 68 programs and 25 companies reviewed in the preparation of this report. As such, this analysis should not be viewed as a complete breakdown of every airborne radar program in production or development. Rather, it functions as a representative sampling of some of the more prominent systems, providing indications as to the market's status as a whole.

Airborne radar provides an integral service over both hostile and friendly ground. Radar systems give pilots the capability to engage and identify remote targets, detect and track missile and enemy movements, survey border areas, and integrate information with fellow forces. Meanwhile, civilian users utilize the systems to increase the situational awareness of commercial airliners, enhancing safety. Defense departments and ministries are the primary buyers of military radars, and airlines are the primary buyers of commercial systems.

### ***\$61.613 Billion Market***

Customers will spend a minimum of \$61.613 billion on airborne radar programs from 2017-2026. Funding values break down according to production phases: 81.4 percent will be allotted to production (or in-production), 12.8 percent will go to O&M (operations and maintenance) (post-production), and 5.0 percent will be used for RDT&E (pre-production). The forecast also includes one program line designated "commingled" funding (a mix of pre-, in-, and post-production contracts), which accounts for 0.8 percent of the market.

It should be noted that as time goes by, the true market value of the sampling will likely rise. Classified programs, in-house company-developed projects, programs yet to be announced, and future technologies will emerge over the coming years. As these factors become clearer, they will be included in the forecast tabulations, and the projections will correct upward.

### ***35,807 Airborne Radar Systems Produced***

Almost 81.4 percent of the funding projected to be allocated in this analysis represents unit production sales of radars specialized for markets as diverse as fire control, early warning, and meteorological systems, and of secondary radars (e.g., identification friend or foe, or IFF). At least 35,807 airborne radar units are expected to be produced over the forecast period.

### ***Changing Nature of Military Engagement Affects Airborne Radar Market***

Of the program sample analyzed, military organizations make up the largest part of the airborne radar market's customer base, accounting for 85.8 percent of the forecast value. The single greatest driver of military procurement is the current threat environment. Over the past decade, militaries have been primarily concerned with how to fight and neutralize an enemy that uses low-tech equipment and asymmetric tactics. As a result, recent airborne radar designs now have better air-to-ground capabilities than ever before.

Meanwhile, as militaries withdraw from the battles in Afghanistan and Iraq, the focus of the procurement effort is changing. After the emergence of the war on terror in the first half of the 2000s, militaries favored rapid, short-turnaround acquisitions of proven technologies over investment in the development of future technologies. Now militaries are placing greater emphasis on next-generation radars. The new generation utilizes new technologies like AESA and gallium nitride (GaN) components and offers enhanced communication in platform-to-platform and platform-to-ground modes.

The current crop of new airborne radar designs is being refocused to enhance air-to-air capabilities. After many years of targeting primarily ground-based threats, militaries are looking to refresh their strength in aerial warfare. This is evidenced by a renewal of interest in airborne early warning programs.

### ***Six Segments – Fire Control Reigns***

For Forecast International's analytical purposes, the airborne radar market has been broken into six segments: early warning, fire control, IFF, meteorological, navigation, and surveillance radars. Of these, the three most valuable segments, in order, are fire control, early warning, and meteorological.

## Analysis 1

***APG-81 Leads the Market***

Of the 68 programs covered in this analysis, Northrop Grumman's multinational APG-81 multimode fire-control AESA radar with electronic warfare capability radar will be the most valuable. The APG-81, whose sole platform is the F-35 JSF fighter jet, will ride the popularity of its platform to wide international sales.

The United States will be the primary driver of APG-81 procurement and development, but purchasing countries will include Australia, Canada, Denmark, Israel, Italy, Japan, the Netherlands, Norway, the Republic of Korea (South Korea), Turkey, and the United Kingdom. Over the course of the next 10 years, the APG-81 will earn \$6.895 billion, accounting for 11.2 percent of the examined market.

***Market Leaders***

"The Market for Airborne Radar Systems" includes the programs of 25 individual companies. Of these, the top five in terms of total market value will be Northrop Grumman, Raytheon, Rockwell Collins, Honeywell, and IAI.

These companies show significant market dominance, splitting a combined 50.0 percent of the total value among them. The remaining 20 companies split a 32.6 percent share, with the unassigned "Manufacturer Varies" category possessing the remaining 17.4 percent.

The highest-ranked company, Northrop Grumman, accounts for 19.7 percent of forecast value, 100.2 percent higher than the second-place company, Rockwell Collins.

\* \* \*

## PROGRAMS

---

The following reports are included in this section: (**Note:** a single report may cover several programs.)

Airborne Reconnaissance Low (ARL)	Global Hawk Integrated Sensor Suite (ISS)
APG-63(V)	Grifo
APG-68/-80 & APG-83 SABR	IAI Family of AEW Systems
APG-78(V) Longbow Radar	I-MASTER
APG-79 & APG-84 RACR	Joint STARS
APG-81(V)	KLC-1
APG-82	KLJ-7
APN-232(V) (CARA)	Lynx (APY-8/DPY-1)
APN-241(V)	MESA (AEW&C)
APQ-187 Silent Knight Radar (SKR)	Ocean Master & Searchmaster
APS-143(V)	PPS-5C/D/E
APS-147 & APS-153	Raven ES-05
APS-150	RBE2
APX-113/APX-125	RDR-4000
APX-123	RDY
APY-9	Scipio
APY-10	Searchwater
AWACS	Seaspray
Bars	Supplemental Programs - Radar Systems: Airborne Radars
ECR-90C (Captor)	Vixen
ELM-2022 (APY-11)	WXR-2100/RTA-4100 MultiScan Radar
ELM-2032 & ELM-2052	Zhuk
EMARSS	ZPY-1 STARLite
Erieye	

# FORECAST INTERNATIONAL

**Order Form.** *For proper shipping, please provide all of the following information.*

Name \_\_\_\_\_

Title \_\_\_\_\_

Company \_\_\_\_\_

Street Address \_\_\_\_\_

City \_\_\_\_\_ State/Prov. \_\_\_\_\_

Country \_\_\_\_\_ Zip \_\_\_\_\_

Phone \_\_\_\_\_ Fax \_\_\_\_\_

Email (required) \_\_\_\_\_

Cardholder Name \_\_\_\_\_

Card# \_\_\_\_\_ Exp. \_\_\_\_\_ CSC# \_\_\_\_\_

Billing Address (if different from above) \_\_\_\_\_

- Check Enclosed   
  Bill Company Purchase Order # and Signature Required   
  Quotation Requested   
  VISA    
  MasterCard    
  American Express    
  Discover 

Name of Product/Service	Code	Qty.	Price

**Don't Forget to Bookmark our Websites and our Blog**  
 See back cover for URLs

Subtotal \_\_\_\_\_  
 Shipping \_\_\_\_\_  
 In Connecticut add 6.35% Sales Tax \_\_\_\_\_  
 Grand Total \_\_\_\_\_



22 Commerce Road, Newtown, CT 06470 USA  
 203.426.0800 Toll-Free: 800.451.4975 (U.S. & Canada)  
 Fax: 203.426.0223  
 forecastinternational.com

### SHIPPING AND HANDLING RATES

	U.S.	World
<b>MARKET INTELLIGENCE SERVICES</b>		
Binder	\$95	\$125
DVD	\$80	\$125
<b>MARKET SEGMENT ANALYSES</b>		
Hard Copy	\$65	\$75



# SALES OFFICES

## HEADQUARTERS USA

### FORECAST INTERNATIONAL

22 Commerce Road  
Newtown, CT 06470 USA  
Phone: 203.426.0800  
Fax: 203.426.1964  
www.forecastinternational.com  
www.fi-aeroweb.com  
www.fi-powerweb.com

### CUSTOMER SERVICE

Phone: 203.426.0800  
Fax: 203.426.0223  
customerservice@forecast1.com

## NORTH & SOUTH AMERICA

### FORECAST INTERNATIONAL

#### ALFRED STRUNA, SALES MANAGER

Phone: 203.270.0633 ext. 140  
Toll-Free: 800.451.4975  
(U.S. & Canada)  
Fax: 203.426.0223  
Email: al.struna@forecast1.com

## EUROPE, MIDDLE EAST, AFRICA & RUSSIA

### FORECAST INTERNATIONAL

#### NANCY BROWN, SALES MANAGER

Phone: 203.426.0800 ext. 159  
Toll-Free: 800.451.4975  
(U.S. & Canada)  
Fax: 203.426.0223  
Email: nancy.brown@forecast1.com

## REPUBLIC OF KOREA

### PAMANONG TRADING COMPANY

#### NAM HEE KIM

79, Nonhyeon-ro  
Windstone #1712, Seocho-gu  
Seoul 06775 KOREA  
Phone: (82) 2 572 4349  
or (82) 2 572 4371  
Fax: (82) 2 572 4370  
Email: nhk@forecast1.com  
www.forecast1.co.kr

## ASIA, AUSTRALIA & PACIFIC RIM

### FORECAST INTERNATIONAL

#### JIM HEAD, SALES MANAGER

Phone: 203.270.0633 ext. 152  
Toll-Free: 800.451.4975  
(U.S. & Canada)  
Fax: 203.426.0223  
Email: jim.head@forecast1.com

## CHINA NATIONAL PUBLICATIONS CHINA

### CHEN KANGKANG

PO Box 88  
16 Gongti East Road  
Chaoyang Beijing 100020 CHINA  
Phone: (86) 10 6506 6688 ext. 8428  
Fax: (86) 10 6586 6970  
Email: chenkk@cnpiec.com.cn

## ALLIED PUBLISHERS PVT. LTD. INDIA

### R. KRISHNAN

Information Products  
Specialized Agencies  
25/10, Commander-In-Chief Road  
Ethiraj Lane, Egmore  
Chennai 600 008 INDIA  
Phone: (91) 44 2822 3470 (direct)  
(91) 44 98402 27226  
Email: alliedpublishers@vsnl.com  
Email: rkrishnan@alliedpublishers.com  
www.alliedchennai.com

## HINTON INFORMATION SERVICES

### CINDY H TU

6F-3 #103 Ruihu Street Neihu  
Taipei 11494 TAIWAN  
Tel: +886 2 27993110 ext. 319  
Email: cindy.tu@hintoninfo.com.tw  
www.hintoninfo.com

## EVA Aviation

### TOSHIYUKI HARADA

903 Casa Gyoen, 2-4-2 Shinjuku,  
Shinjuku-ku, Tokyo 160-0022, JAPAN  
Tel +81 3 6380 6104  
Email: Toshiyuki.Harada@evaaviation.com  
www.Evaaviation.com

## Terms and Conditions

### DISCOUNT PRICING

All orders over \$4,000 receive up to a 15% discount.

### BOOKSELLER DISCOUNTS

For information, call 203.270.0633 or 800.451.4975 (Toll-Free U.S. & Canada).  
Email: sales@forecast1.com.

### NEW CLIENTS

Payment in full is required with the initial order.

### TERMS

Net 30 days. For overdue accounts, we reserve the right to assess interest of 8% annually, and add collection fees.

### RETURNS OR REFUNDS

Due to the nature of our products, no returns are accepted and no refunds are provided.

### FORMS OF PAYMENT

We accept a company check drawn on a U.S. bank in U.S. dollars, Wire Transfer, VISA, MasterCard, American Express, or Discover for up to \$20,000. For Wire Transfer instructions, contact customerservice@forecast1.com or call 203.270.0633.

Include the quotation or invoice number with your payment.

### DATA USAGE

Photocopy/Copyright Permission: Forecast International observes all copyright laws. Reproduction and distribution of any product, except newsletters, is prohibited by law. To obtain a release, please call 203.270.0633 or contact customerservice@forecast1.com.

### ELECTRONIC DATA LICENSING

All products are sold and licensed for single-site, single-user applications. Multi-site, multi-user licensing is available. See page 12. Call 203.270.0633 or contact sales@forecast1.com to discuss your requirements.