

# Aircraft Survivability Equipment Market Analysis (2024-2034): Trends, Growth Drivers, and Forecasts at 7.30% CAGR

*The global aircraft survivability equipment market size was worth around USD 4.79 billion in 2024 and is predicted to grow to around USD 9.68 billion by 2034*

PUNE, MAHARASHTRA, INDIA, July 30, 2025 /EINPresswire.com/ -- Executive Summary

The [global aircraft survivability equipment \(ASE\) market](#) was valued at approximately USD 4.79 billion in 2024

and is expected to nearly double to around USD 9.68 billion by 2034, growing at a compound annual growth rate (CAGR) of 7.30% during the forecast period (2025–2034). This growth is driven by increasing global defense budgets, technological advancements in electronic warfare systems, and growing threats from modern anti-aircraft weaponry.

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Aircraft survivability equipment market size was worth around USD 4.79 billion in 2024 and is predicted to grow to around USD 9.68 billion by 2034, (CAGR) of roughly 7.30% between 2025 and 2034.

”

*Deepak Rupnar*

countermeasures, and infrared countermeasures.

Rising geopolitical tensions, an increase in asymmetric warfare, and modern battlefield threats



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## Market Overview

Aircraft survivability equipment refers to systems and components designed to protect military and specialized civil aircraft from enemy detection, targeting, and attack. These include missile warning systems, radar warning receivers, countermeasure dispensing systems, electronic

are compelling nations to equip their aircraft fleets with advanced survivability technologies. The demand for enhanced mission capability, aircraft survivability in contested zones, and pilot safety are major market drivers.

#### Key Insights:

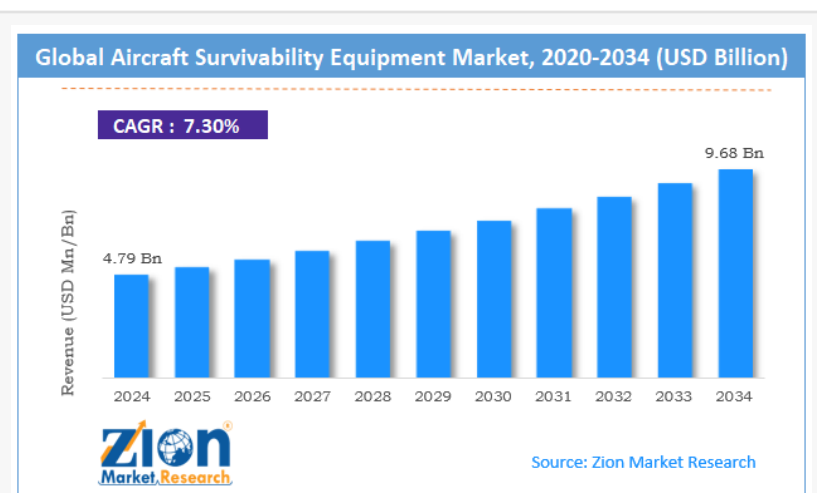
As per the analysis shared by our research analyst, the global aircraft survivability equipment market is estimated to grow annually at a CAGR of around 7.30% over the forecast period (2025-2034)

In terms of revenue, the global aircraft survivability equipment market size was valued at around USD 4.79 billion in 2024 and is projected to reach USD 9.68 billion by 2034.

The aircraft survivability equipment market is projected to grow at a significant rate due to the growing development of modern military-grade aircraft and rising military budgets. Based on the equipment, the electronic countermeasures segment is growing at a high rate and will continue to dominate the global market as per industry projections.

Based on the application, the defense segment is anticipated to command the largest market share.

Based on region, North America is projected to dominate the global market during the forecast period.



#### Aircraft Survivability Equipment Market Size

#### IS LED BY PLAYERS LIKE:

**BAE SYSTEMS**

**NORTHROP GRUMMAN**

**Elbit Systems Ltd.**

**RTX**  
Raytheon Technologies

**survitec**  
Group Limited

**MB** **Honeywell**  
Aerospace

**THALES**

**SAFRAN**

**TULMAR**  
Safety Systems

**FCAH** Aerospace

**Ballistic Recovery Systems**  
(BRS Aerospace)

**SAAB**

**Northrop Grumman Corporation**

**AmSafe** inc.

**DTV Corporation**

**DIAC**

#### Aircraft Survivability Equipment Market Competitive Analysis

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#### Key Market Drivers

Growing Defense Spending

Governments across North America, Europe, and Asia-Pacific are increasing defense allocations

to modernize air fleets and upgrade aircraft survivability systems.

#### Rising Geopolitical Tensions and Conflicts

Escalating regional conflicts and increasing deployment of aircraft in hostile environments have pushed demand for ASE systems.

#### Technological Advancements

Innovations in electronic warfare (EW), stealth technologies, AI-based threat detection, and automated countermeasures are transforming the ASE landscape.

#### Modernization of Legacy Fleets

Upgrading older aircraft platforms with cutting-edge survivability systems is a key priority for militaries worldwide.

#### Market Segmentation

##### By Equipment Type

Electronic Countermeasure (ECM) Systems

Missile Warning Systems (MWS)

Radar Warning Receivers (RWR)

Countermeasure Dispensing Systems (CMDS)

Infrared Countermeasure Systems (IRCM)

Others (e.g., Laser Warning Systems)

□ ECM and IRCM systems are expected to witness the fastest growth due to their ability to defeat advanced radar and heat-seeking threats.

##### By Platform

Fixed-Wing Combat Aircraft

Rotary-Wing Aircraft (Helicopters)

Unmanned Aerial Vehicles (UAVs)

Transport & Reconnaissance Aircraft

□□ Combat aircraft continue to hold the dominant share due to their extensive deployment in high-threat zones.

##### By End User

Defense

Homeland Security

Specialized Civilian Use (e.g., government, emergency response)

□ Defense applications are anticipated to dominate, backed by rising global military aircraft procurement.

## Regional Analysis

### 1. North America

Largest market share in 2024

Major players like Northrop Grumman, BAE Systems, and Raytheon Technologies operate here. Continuous R&D and defense modernization programs.

### 2. Europe

Strong growth due to NATO member spending and regional security challenges.

Focus on aircraft fleet modernization and cross-border defense collaborations.

### 3. Asia-Pacific

Fastest-growing region

Driven by increasing defense budgets in China, India, South Korea, and Japan.

Rising border conflicts and military modernization initiatives.

### 4. Middle East & Africa

Growth fueled by regional tensions and growing defense imports.

### 5. Latin America

Modest growth due to limited budgets but increasing interest in border and narcotics surveillance applications.

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## Competitive Landscape

The ASE market is highly competitive and technology-driven. Major companies invest heavily in R&D and strategic partnerships with defense agencies.

The global aircraft survivability equipment market is led by players like:

BAE Systems plc

Elbit Systems Ltd.

Survitec Group Limited

Thales Group

TULMAR Safety Systems

Ballistic Recovery Systems (BRS Aerospace)

Northrop Grumman Corporation

RTX Corporation (Raytheon Technologies)

Martin-Baker Aircraft Company Limited

Honeywell Aerospace

Safran S.A.

FCAH Aerospace

RUAG Ltd.

Saab AB  
AmSafe Inc.

□ Strategic mergers, joint ventures, and long-term government contracts are common to maintain market dominance.

Recent Developments

2024: Raytheon launched a next-gen Directed Infrared Countermeasure (DIRCM) system for rotary aircraft.  
2023: BAE Systems secured a \$400M contract for advanced ASE upgrades on U.S. Army helicopters.  
2023: Saab AB introduced an AI-driven radar warning system with enhanced tracking and response capabilities.

Challenges and Restraints

High costs of development and integration  
Complexity of retrofitting legacy platforms  
Stringent regulatory and export controls  
Vulnerability to supply chain disruptions and cybersecurity risks

Opportunities Ahead

Integration with AI, big data, and advanced sensors  
Adoption of modular and scalable ASE systems  
Growth in unmanned aerial systems (UAS) survivability  
Expanding markets in emerging defense economies

Conclusion

The global aircraft survivability equipment market is poised for robust growth in the coming decade. With increasing defense investments and rising threats to air operations, the demand for sophisticated ASE systems is set to accelerate. Industry players that focus on innovation, modular design, and AI integration will be best positioned to lead in this evolving market.

Report Summary Table

Parameter   Details  
Market Size (2024)   USD 4.79 Billion  
Market Size (2034)   USD 9.68 Billion  
CAGR (2025–2034)   7.30%  
Dominant Segment   Electronic Countermeasure Systems  
Leading Region   North America  
Fastest Growing Region   Asia-Pacific

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