The Global Man-Portable Military Electronics Market 2013-2023

Description: This report is the result of extensive market and company research covering the global man-portable military electronics industry. It provides detailed analysis of both historic and forecast global industry values, factors influencing demand, the challenges faced by industry participants, analysis of the leading companies in the industry, and key news.

Why was the report written?

‘The Global Man-Portable Military Electronics Market 2013-2023’ offers the reader detailed analysis of the global man-portable military electronics market over the next ten years, alongside potential market opportunities to enter the industry, using detailed market size forecasts.

What are the key drivers behind recent market changes?

Militaries around the world are focusing on soldier modernization programs and this development has directly influenced growth in the man-portable electronics category. Soldier modernization programs comprise advanced man-portable devices for communication, force protection, and surveillance and reconnaissance operations. The recent successful experiences with the soldier modernization kits in Afghanistan and Iraq, has increased trust in man-portable devices amongst soldiers, especially during contemporary and counterinsurgency operations. In addition, the miniaturization of man-portable devices as part of soldier modernization kits has had a positive influence on category growth.

Earlier, a number of communication, ISTAR and force protection devices such as tactical networking radios, sensors, anti-tank missile systems, GPRS systems, navigation and enemy location device, and UAVs were not portable and mounted to vehicles. The portability of these devices as part of the soldier gear has led to a number of new possibilities for the soldiers in the land-based combat operations. The French, FELIN program is considered by some to have the most technologically advanced man-portable devices and a number of other large militaries, such as the US, the UK and Russia are also allocating their military budgets to update their indigenous soldier modernization programs. These developments will have a long term positive impact on the category expenditure.

What makes this report unique and essential to read?

‘The Global Man-Portable Military Electronics Market 2013-2023’ provides detailed analysis of the current industry size and growth expectations from 2013 to 2023, including highlights of key growth stimulators. It also benchmarks the industry against key global markets and provides detailed understanding of emerging opportunities in specific areas.

Key Features and Benefits

The report provides detailed analysis of the market for man-portable military electronics during 2013-2023, including the factors that influence why countries are investing or cutting expenditure on man-portable military electronics. It provides detailed expectations of growth rates and projected total expenditure.

The costs of ISTAR and communication systems are increasing with the advancements in technologies and required capabilities demanded by military. The RandD costs have become so high due to which the militaries around the world are encouraging suppliers to work in partnership and the use of lower cost COTS products. Therefore, there are a number of joint development projects that are being undertaken to share the cost without compromising on such initiatives.

The success of man-portable miniature UAVs (M-UAVs) in the Afghanistan and Iraq wars has motivated a number of militaries around the world to procure M-UAVs for surveillance purposes. The uses of M-UAVs also help to reduce the number of casualties during surveillance operations, a prime concern for militaries in recent times. Heavily used by European and American soldiers during the wars, miniature UAVs production is expected to increase as the technology moves up the ladder in the category. Most aerial vehicles do not require landing strips, have strong flight arrangements, and are easy to deploy; therefore becoming an indispensable component of soldiers' gear and man pack kits.
As the technology evolves in this sector, UAVs are expected to feature increasing stealth characteristics, which will make this segment even more promising and attractive for militaries. Although these new additions to the soldier’s gear have increased the weight of soldier packs, and they are carrying the heaviest load of equipment ever, soldiers are not refuting the utility of the equipment and are ready to compromise their clothing to include the miniature UAVs. Major programs in the M-UAV segment include the US$283 million Raven RQ-11B and RQ-20A Puma program by the US, and the Skylark-II program by Israel.

Military operations are becoming highly sophisticated around the world to meet the demand for land based combat operations. Interoperability and strategic communications have become essential in ensuring success in land based attacks. The need for portable electronics has now become paramount for quick response, especially for land based operations which don’t rely on vehicle-mounted systems. These requirements, coupled with the experiences drawn from Iraq and Afghanistan conflicts have led the defense companies to develop advanced portable electronic systems to cater to the growing demand.

Some of the portable devices such as tactical radios provide infantry forces with an ability to rapidly establish relatively high bandwidth connections and share information at a rapid speed with other military stations. Making greater use of these systems improve situational awareness at multiple levels of command and facilitate improved coordination between units, especially in those conflicts where multinational coalition forces operate. There are few advanced communication equipment that are able to transmit real-time information and data to and from the command center to the battlefield, without revealing the location of the command center to potential enemy signals intelligence (SIGINT) systems. These devices were actively used by European and American forces in the Afghan and Iraq wars, helping them to defeat surprise guerilla attacks.

Key Market Issues

The development of military communication systems that facilitate truly network centric operations (NCOs) has continued to present challenges for researchers and developers for more than a decade. During this time a great deal of focus has been placed on applying commercial products and internet design methodologies to military systems. While this strategy has met with some success, it does not always translate well to the more challenging environment encountered in military operations. Some of these fundamental challenges include harsh radio frequency (RF) propagation environments, severe spectrum limitations, varying degrees of node mobility and stringent security requirements related to data encryption.

Adding to these fundamental challenges, is the fact that military networks need to support a variety of applications, with needs ranging from real time information exchange, to reliable large volume data dissemination. Given these issues which are yet to be resolved in their entirety, the providers of man portable electronics systems face a pressing need to enhance their technological capabilities in order to ensure that network-centric doctrines can be implemented down to the infantry fighter who will carry the related equipment. If sufficient technological know-how is not available in the near future, a number of man portable electronics that are intended to enable Network Centric Warfare will have become redundant and in the process, will work to defeat the very purpose of networked warfare.

Reducing the weight of man portable equipment without compromising combat performance is a key challenge for the man portable electronics industry. The incorporation of sophisticated portable electronics to protect and empower the soldier has resulted in an exponential increase in the total weight being carried. The combined weight of equipment prevents infantry personnel from being agile, mobile and effective war fighters and lives of soldiers are being put at risk as heavy lifesaving equipment is often being left behind. Defense manufacturing companies worldwide are focusing on sourcing and integrating the most affordable lightweight man portable electronics technology to reduce the burden to personnel.

Defense ministries are also funding research and development projects that focus on reducing the weight of equipment, power and communication systems that soldiers carry. For example, the US, through its Nett Warrior program, is making substantial progress in lightening the soldiers load while still delivering next generation capabilities. The UK MoD plans to reduce the load on soldiers from 70 kg to no more than 25 kg, under the Reducing the Burden on the Dismounted Soldier (RBDS) program. However, a number of technological advancements are required in order to achieve these goals, which poses a significant challenge for market participants who have to maintain the effectiveness of man portable electronics systems, while at the same time reduce the weight of this equipment within prescribed limits.
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<tr>
<td>Electronic (PDF) - Enterprisewide</td>
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<td>USD 14400</td>
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