



NEXA GLOBAL

INDUSTRY OVERVIEW

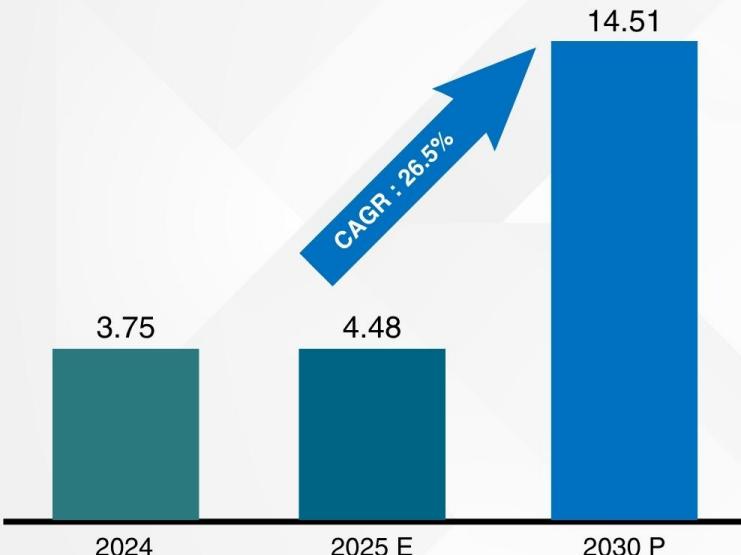
The global Anti-Drone / Counter-UAS sector is a rapidly expanding part of the defense and security industry, driven by rising drone misuse, increasing airspace threats, and the need to protect critical infrastructure. Advancements in radar, RF analytics, EO/IR sensors, and AI-powered fusion systems are reshaping the competitive landscape, with governments tightening regulations and prioritizing airspace security technologies.

Market demand is strong across military, homeland security, airports, energy facilities, major events, and high-value infrastructure. Growth is supported by higher defense budgets, escalating drone incidents, and evolving compliance requirements. The overall outlook remains high-growth, mission-critical, and strategically important for national and commercial security worldwide.

GLOBAL ANTI-DRONE SYSTEM MARKET OVERVIEW



Global Anti-Drone System Market Size (USD Bn)



- North America led 2024 revenues with 41.25%, driven by FAA mandates and a \$50B Pentagon counter-UAS push.
- Asia-Pacific is the fastest growing region (25.66% CAGR), fueled by Japan-US microwave projects and China's drone boom. Detection systems hold 55.43% share, but neutralization solutions are rising fastest as priorities shift to hard-kill.
- By technology, detection systems led the anti-drone market with 55.43% of the share in 2024; neutralization systems are projected to surge at a 29.52% CAGR to 2030.
- By platform, ground-fixed solutions held 42.12% of the anti-drone market in 2024, while UAV-based counter-UAS platforms expand at a 26.32% CAGR through 2030.
- By end-use vertical, military and defense applications accounted for 44.56% of 2024 revenue; critical infrastructure protection is advancing at a 21.36% CAGR to 2030.

North America led with 41.25% revenue in 2024, whereas Asia-Pacific is forecasted to post the quickest 25.66% CAGR.



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GLOBAL ANTI-DRONE SYSTEM INFRASTRUCTURE REQUIREMENT

#	Asset / Infrastructure Type	Global Count (approx.)	Conservative Stacks / Site	Moderate Stacks / Site	Aggressive Stacks / Site	Total Stacks (Conservative)	Total Stacks (Moderate)	Total Stacks (Aggressive)	Key Notes / Remarks
1	Airports (scheduled commercial)	4,072	1	2	2	4,072	8,144	8,144	Primary aviation hubs —high C-UAS priority; ATC integration needed.
2	All airports & airfields (incl. GA & military)	45,500	0.1	0.5	1	4,550	22,750	45,500	Includes all general-aviation strips & military fields; used for upper-bound modeling.
3	Major seaports (top 800)	800	1	1	1	800	800	800	Largest container / naval ports.
4	All ports & harbours	6,000	0.1	0.5	1	600	3,000	6,000	Wider maritime infrastructure; optional for aggressive scenario.
5	Oil refineries (operational)	825	1	1.5	2	825	1,238	1,650	Energy infrastructure —higher tolerance for active countermeasures.
6	Power plants (all types)	19,000	0.1	0.25	0.5	1,900	4,750	9,500	Includes fossil, nuclear, hydro, and renewables > 50 MW; critical for grid security.
7	Data centres(operational)	11,800	0.1	0.25	1	1,180	2,950	11,800	High-sensitivity facilities; detection + SOC integration key.
8	Large stadiums / event venues (≥ 10 k cap.)	2,300	0.5	1	1	1,150	2,300	2,300	Portable deployments for major events.
9	Corporate / industrial campuses (large HQs)	5,000	0.2	1	1	1,000	5,000	5,000	Major corporate / industrial sites; often data-intensive.
10	Military bases / installations (global)	5,000	0.5	1	1	2,500	5,000	5,000	Airbases, garrisons, naval stations; multi-stack sites.
TOTAL ESTIMATED STACKS		—	—	—	—	≈18,577	≈55,932	≈95,694	Totals rounded; aligns with global market modeling (≈8 k – 20 k – 90 k range depending on coverage)

Source: atag.org, aviationbenefits.org, sinay.ai, offshore-technology.com, brightlio.com, stadium.com, proxy (enterprise analysis), visual capitalist

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GLOBAL ANTI-DRONE SYSTEM MARKET OVERVIEW

APAC market ~\$2.1B (2024/25) with
~30%+ CAGR and strong procurement pipeline.

UAE market growing ~20–30% CAGR,
driven by heavy UMEX-linked investments.

GCC (Saudi, UAE, Qatar, Kuwait):
focused procurement for military bases,
oil & gas assets and VIP protection.

MENA demand driven by
security, energy, and events,
with >20% growth forecast.

Australia is driving major C-UAS procurement
(Project LAND 156, laser systems)
and backing local exporters
like DroneShield and AIM Defense.

Japan: formal MOD budgeting for
counter-drone gear —new allocations
(e.g., multi-billion yen) to field detection
and defeat systems for
Self-Defense Forces and bases.



Country-wise, the U.S. is expected to lead the
global market in terms of revenue in 2030.

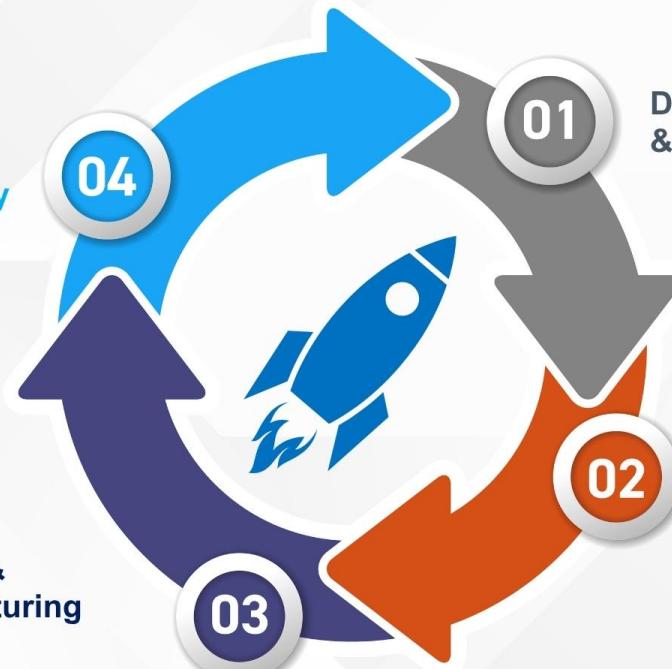
Critical Infrastructure Protection

Rising Drone Threats & Border Security

Defense Modernization & Budget Push

Technological Advancements

Government Policy & Indigenous Manufacturing



Shift from Detection to Neutralization

- Early focus was on radar & EO/IR surveillance; 2025 shows procurement moving toward hard-kill and directed energy weapons (DEWs).

Border Security Still the Largest Driver

- Frequent UAV intrusions from Pakistan and concerns over Chinese UAV tech sustain frontline deployment demand.

Global Partnerships Emerging

- Collaborations with Israel, US, and European firms for Heron TP drones, microwave projects, and joint R&D.



Indigenous Solutions Gaining Ground

- "Make in India" push +PLI scheme fueling domestic anti-drone products like HAL - BEL systems, Indrajaal AI grid, SDAL's Bhargavastra.

Rising Demand from Civil Infrastructure

- Beyond defense, airports, power plants, ports, oil refineries, and nuclear facilities are adopting anti-drone systems.

Market Outlook

- India's counter-UAS market projected to grow at >20% CAGR through 2030, aligning with defense modernization and export potential.