

2018-2023

# *Counter-Drone Market & Technologies*



*Homeland Security Research Corp.*

# Counter-Drone Market & Technologies – 2018-2023

**August 2018**

*Homeland Security Research Corp. (HSRC) is an international market and technology research firm specializing in the Homeland Security (HLS) & Public Safety (PS) Industry. HSRC provides premium market off-the-shelf and custom reports on present and emerging technologies and industry expertise, enabling global clients to gain time-critical insight into business opportunities. HSRC's clients include the EU, NATO, U.S. Congress, DHS, U.S. Army, U.S. Navy, DOD, DOT, and US Congress GAO among others; as well as Counter Terror & PS government agencies in Japan, Korea, Taiwan, Israel, Canada, UK, Germany, Australia, Sweden, Finland, Singapore. With over 950 private sector clients (72% repeat customers), including major defense and security vendors, and Fortune 2000 companies, HSRC earned the reputation as the industry's Gold Standard for Homeland Security & Public Safety market reports.*

*Washington D.C. 20004, 601 Pennsylvania Ave., NW Suite 900,  
Tel: 202-455-0966, [info@hsrc.biz](mailto:info@hsrc.biz), [www.homelandsecurityresearch.com](http://www.homelandsecurityresearch.com)*

## Table of Contents

<b>1</b>	<b>Executive Summary .....</b>	<b>26</b>
1.1	Major Findings & Conclusions .....	26
1.2	Counter-Drone Market & Technologies Background.....	26
1.3	Counter-Drone Market 2017-2023 .....	26
1.3.1	Market Size – Assesment and Forecast – 2017-2023.....	26
1.3.2	Market Dynamics 2017-2023.....	27
1.3.3	Market Breakdown 2017-2023 .....	28
1.3.4	Global Counter-Drone Market Organogram .....	29
<b>2</b>	<b>Global Market Background.....</b>	<b>31</b>
2.1	Global Security Concerns .....	31
2.1.1	Global Risks 2017: A Regional Perceptive .....	32
2.1.2	North America Homeland Security & Public Safty Market Drivers .....	35
2.1.2.1	Cyber Attacks .....	36
2.1.2.2	Terrorism Threat.....	36
2.1.2.3	Natural Disasters .....	36
2.1.3	European Homeland Security & Public Safety Market Drivers.....	37
2.1.3.1	New Realities of Terror Across Europe.....	38
2.1.3.2	Fight Against Terrorist Financing.....	40
2.1.4	APAC Homeland Security & Public Safety Market Drivers .....	41
2.1.4.1	Transnational Terrorism.....	42
2.1.4.2	Natural Disasters .....	42
2.1.4.3	Insurgency Operations.....	42
2.1.5	Latin America Homeland Security & Public Safety Markets Drivers .....	43
2.1.5.1	Organized Crime.....	43
2.1.5.2	Illicit Financial Flows .....	44
2.1.5.3	Drug Trafficking .....	44
2.1.6	Middle East and Africa Homeland Security & Public Safety Markets Drivers .....	45
2.1.6.1	Terrorism Threat.....	46
2.1.6.2	Political and Social instability .....	46
2.1.6.3	Cyber Attacks .....	46
2.2	Global Counter-Drone Market Organogram .....	47
<b>3</b>	<b>Counter-Drone Market &amp; Technologies – Drivers and Inhibitors .....</b>	<b>48</b>
3.1	Counter-Drone Market & Technologies: Drivers .....	48
3.2	Counter-Drone Market & Technologies: Inhibitors .....	49
<b>4</b>	<b>Counter-Drone Market &amp; Technologies – SWOT Analysis.....</b>	<b>50</b>
<b>5</b>	<b>Technologies .....</b>	<b>51</b>

5.1	Detection & Tracking Systems.....	51
5.1.1	Radar.....	52
5.1.2	Radio-Frequency (RF).....	52
5.1.3	Electro Optical (EO).....	53
5.1.4	Infrared (IR).....	53
5.1.5	Acoustic.....	53
5.1.6	Combined Sensors.....	53
5.2	Countermeasure.....	53
5.2.1	RF Jamming.....	54
5.2.2	GNSS Jamming.....	54
5.2.3	Spoofing.....	55
5.2.4	Laser.....	55
5.2.5	Nets.....	55
5.2.6	Projectile.....	55
5.2.7	Combined Countermeasure Elements.....	55
5.3	Platform Types.....	56
5.3.1	Ground-based.....	56
5.3.2	Hand-held.....	56
5.3.3	UAV-based.....	56
<b>6</b>	<b>System Configuration.....</b>	<b>57</b>
6.1	Fixed.....	57
6.1.1	Market Size – Assessment and Forecast – 2017-2023.....	57
6.1.2	Market Dynamics 2017-2023.....	58
6.1.3	Market Breakdown 2017-2023.....	58
6.2	Mobile.....	58
6.2.1	Market Size – Assessment and Forecast – 2017-2023.....	58
6.2.2	Market Dynamics 2017-2023.....	59
6.2.3	Market Breakdown 2017-2023.....	60
<b>7</b>	<b>System Purpose.....</b>	<b>61</b>
7.1	Detection & Mitigation.....	61
7.1.1	Market Size – Assessment and Forecast – 2017-2023.....	61
7.1.2	Market Dynamics 2017-2023.....	62
7.1.3	Market Breakdown 2017-2023.....	63
7.2	Detection Only.....	63
7.2.1	Market Size – Assessment and Forecast – 2017-2023.....	63
7.2.2	Market Dynamics 2017-2023.....	64
7.2.3	Market Breakdown 2017-2023.....	65
<b>8</b>	<b>Global Counter-Drone Market by Vertical Market – 2017-2023.....</b>	<b>66</b>
8.1	Consolidates Market 2017-2023.....	66
8.2	Market Analysis 2017-2023.....	67
8.3	Market Dynamics 2017-2023.....	67
8.4	Market Breakdown 2017-2023.....	68
<b>9</b>	<b>Vertical Markets.....</b>	<b>70</b>
9.1	Defense.....	71

9.1.1	Incidents .....	71
9.1.2	Use Cases .....	72
9.1.2.1	Handheld Weapons .....	73
9.1.2.2	Large Weapons .....	73
9.1.2.3	Laser Weapon System .....	73
9.1.2.4	Electronic Warfare .....	73
9.1.3	Market Size – Assesmet and Forecast – 2017-2023 .....	73
9.1.4	Market Dynamics 2017-2023.....	74
9.1.5	Market Breakdown 2017-2023 .....	75
9.2	Airport Security .....	75
9.2.1	Incidents .....	75
9.2.2	Use Cases.....	77
9.2.2.1	Onboard Avionics and Sensor Equipment.....	77
9.2.2.2	Ground-based Drone Detection and Tracking Equipment.....	77
9.2.2.3	Drone Interception and Interdiction Systems .....	77
9.2.2.4	Drone Tracking and Interdiction Hybrid Systems.....	78
9.2.3	Market Size – Assesmet and Forecast – 2017-2023.....	78
9.2.4	Market Dynamics 2017-2023.....	79
9.2.5	Market Breakdown 2017-2023 .....	79
9.3	Public Events Security .....	79
9.3.1	Incidents .....	80
9.3.2	Use Cases.....	80
9.3.2.1	Drones to Protect Airspace.....	80
9.3.2.2	No Drone Zone .....	80
9.3.3	Market Size – Assesmet and Forecast – 2017-2023.....	80
9.3.4	Market Dynamics 2017-2023.....	81
9.3.5	Market Breakdown 2017-2023 .....	82
9.4	Aerial/Aviation Security .....	82
9.4.1	Incidents .....	83
9.4.2	Case Study – Incendiary Kites .....	83
9.4.3	Market Size – Assesmet and Forecast – 2017-2023.....	85
9.4.4	Market Dynamics 2017-2023.....	86
9.4.5	Market Breakdown 2017-2023 .....	87
9.5	Critical Infrastructure.....	87
9.5.1	Incidents .....	88
9.5.2	Use Cases.....	88
9.5.2.1	Detection, Identification and Tracking.....	88
9.5.2.2	Threat Decision-making.....	89
9.5.2.3	Threat Response .....	89
9.5.3	Market Size – Assesmet and Forecast – 2017-2023.....	89
9.5.4	Market Dynamics 2017-2023.....	90
9.5.5	Market Breakdown 2017-2023 .....	91
9.6	Correctional Facilities.....	91
9.6.1	Incidents .....	91
9.6.2	Use Cases.....	92

9.6.2.1	Drone Detection Sensors.....	92
9.6.2.2	Tracking.....	92
9.6.3	Market Size – Assesmet and Forecast – 2017-2023.....	92
9.6.4	Market Dynamics 2017-2023.....	93
9.6.5	Market Breakdown 2017-2023 .....	94
9.7	Private Facilities.....	94
9.7.1	Market Size – Assesmet and Forecast – 2017-2023.....	94
9.7.2	Market Dynamics 2017-2023.....	95
9.7.3	Market Breakdown 2017-2023 .....	96
9.7.4	Incidents.....	96
9.8	Other Vertical Markets .....	96
9.8.1	Policing.....	96
9.8.1.1	Incidents .....	97
9.8.1.2	Use Cases .....	97
9.8.2	VIP Protection Services.....	98
9.8.2.1	Incidents .....	98
9.8.2.2	Use Cases .....	98
9.8.3	Market Size – Assesmet and Forecast – 2017-2023.....	99
9.8.4	Market Dynamics 2017-2023.....	100
9.8.5	Market Breakdown 2017-2023 .....	100
<b>10</b>	<b>Business Opportunities .....</b>	<b>101</b>
10.1	North America.....	101
10.2	Latin America.....	104
10.3	Asia Pacific .....	105
10.4	Europe .....	106
10.5	Middle East and Africa.....	108
<b>11</b>	<b>Global Counter-Drone Market by Region .....</b>	<b>109</b>
11.1	5 Regional Markets Comparison Analysis .....	109
11.1.1	Consolidated Market 2017-2023 .....	109
11.1.2	Market Analysis 2017-2023.....	109
11.1.3	Market Dynamics 2017-2023.....	111
11.1.4	Market Breakdown 2017-2023 .....	111
<b>12</b>	<b>Global Counter-Drone Market by Country.....</b>	<b>113</b>
12.1	19 National Markets Comparison Analysis .....	113
12.1.1	Consolidated Market 2017-2023 .....	113
12.1.2	Market Analysis 2017-2023.....	114
12.1.3	Market Dynamics 2017-2023.....	116
12.1.4	Market Breakdown 2017-2023 .....	116
	<b>North America.....</b>	<b>121</b>
<b>13</b>	<b>U.S.A Counter-Drone Market – 2018-2023 .....</b>	<b>121</b>
13.1	Facts & Figures 2018.....	121
13.2	U.S National Security Risk Assesment 2018 .....	121
13.3	U.S Federal Homeland Security and Public Safety Related Organizations.....	122

13.3.1	The U.S Federal Homeland Security Infrastructure .....	124
13.3.2	The Department of Homeland Security Organizational Structure.....	126
13.4	U.S. Homeland Security & Public Safety Market: Business Opportunities .....	126
13.5	U.S. Homeland Security & Public Safety: Market Drivers .....	127
13.6	U.S. Homeland Security & Public Safety: Market Inhibitors .....	130
13.7	U.S. Counter-Drone Market – 2018-2023 .....	130
13.7.1	Market Size – Assessment and Forecast – 2017-2023 .....	130
13.7.2	Market Dynamics 2017-2023.....	131
13.7.3	Market Breakdown 2017-2023 .....	132
<b>14</b>	<b>Canada Counter-Drone Market – 2018-2023.....</b>	<b>132</b>
14.1	Facts & Figures 2018.....	132
14.2	Canada National Security Risk Assessment 2018.....	132
14.3	Canada Major Homeland Security and Public Safety Organizations.....	133
14.3.1	Canada Homeland Security & Public Safety Agencies Organogram .....	134
14.3.2	Canada Border Services Agency (CBSA) .....	134
14.3.3	Canadian Security Intelligence Services (CSIS).....	134
14.3.4	Royal Canadian Mounted Police (RCMP) .....	135
14.4	Canada Homeland Security & Public Safety Market: Business Opportunities .....	135
14.5	Canada Homeland Security & Public Safety: Market Drivers.....	136
14.6	Canada Homeland Security & Public Safety: Market Inhibitors .....	138
14.7	Canada Counter-Drone Market – 2018-2023.....	140
14.7.1	Market Size – Assessment and Forecast – 2017-2023 .....	140
14.7.2	Market Dynamics 2017-2023.....	141
14.7.3	Market Breakdown 2017-2023 .....	141
	<b>Europe .....</b>	<b>142</b>
<b>15</b>	<b>Germany Counter-Drone Market – 2018-2023 .....</b>	<b>142</b>
15.1	Facts & Figures 2018.....	142
15.2	Germany National Security Risk Assessment 2018.....	142
15.3	Germany Major Homeland Security and Public Safety Organizations.....	143
15.3.1	Germany Homeland Security & Public Safety Agencies Organogram .....	144
15.3.2	Germany Security and Intelligence Agencies .....	145
15.4	Germany Privacy Issues .....	145
15.5	Germany Homeland Security & Public Safety Market: Business Opportunities .....	146
15.6	Germany Homeland Security & Public Safety: Market Drivers .....	147

15.7	Germany Homeland Security & Public Safety: Market Inhibitors .....	149
15.8	Germany Counter-Drone Market – 2018-2023 .....	150
15.8.1	Market Size – Assessment and Forecast – 2017-2023 .....	150
15.8.2	Market Dynamics 2017-2023.....	151
15.8.3	Market Breakdown 2017-2023 .....	152
<b>16</b>	<b>France Counter-Drone Market – 2018-2023 .....</b>	<b>152</b>
16.1	Facts & Figures 2018.....	152
16.2	France National Security Risk Assessment 2018 .....	152
16.3	France Homeland Security and Public Safety Regulation.....	153
16.4	France Homeland Security & Public Safety Agencies.....	154
16.5	France Homeland Security & Public Safety Market: Business Opportunities .....	155
16.6	France Homeland Security & Public Safety: Market Drivers .....	156
16.7	France Homeland Security & Public Safety: Market Inhibitors .....	157
16.8	France Counter-Drone Market 2018-2023 .....	158
16.8.1	Market Size – Assessment and Forecast – 2017-2023 .....	158
16.8.2	Market Dynamics 2017-2023.....	159
16.8.3	Market Breakdown 2017-2023 .....	159
<b>17</b>	<b>UK Counter-Drone Market – 2018-2023 .....</b>	<b>159</b>
17.1	Facts & Figures 2018.....	160
17.2	UK National Security Risk Assessment 2018 .....	160
17.3	UK Major Homeland Security and Public Safety Organizations.....	162
17.3.1	UK Homeland Security & Public Safety Agencies Organogram .....	163
17.3.2	UK Police and Law Enforcement Agencies .....	163
17.3.3	UK Security and Intelligence Agencies.....	164
17.3.4	UK Fight Against Terrorist Financing.....	164
17.3.5	UK Homeland Security and Public Safety Regulation Initiatives .....	166
17.3.5.1	UK Investigatory Powers Bill.....	166
17.3.5.2	UK Counter Terror Legislation .....	166
17.4	UK Homeland Security & Public Safety Market: Business Opportunities .....	166
17.5	UK Homeland Security & Public Safety: Market Drivers .....	168
17.6	UK Homeland Security & Public Safety: Market Inhibitors .....	170
17.7	UK Counter-Drone Market – 2018-2023 .....	171
17.7.1	Market Size – Assessment and Forecast – 2017-2023 .....	171
17.7.2	Market Dynamics 2017-2023.....	172
17.7.3	Market Breakdown 2017-2023 .....	172
<b>18</b>	<b>Italy Counter-Drone Market – 2018-2023 .....</b>	<b>173</b>
18.1	Facts & Figures 2018.....	173
18.2	Italy National Security Risk Assessment 2018.....	173



18.3	Italy Major Homeland Security and Public Safety Organizations.....	173
18.3.1	Italy Homeland Security & Public Safety Agencies Organogram .....	175
18.4	Italy Homeland Security & Public Safety Market: Business Opportunities .....	176
18.5	Italy Homeland Security & Public Safety: Market Drivers.....	177
18.6	Italy Homeland Security & Public Safety: Market Inhibitors .....	179
18.7	Italy Counter-Drone Market 2018-2023.....	179
18.7.1	Market Size – Assessment and Forecast – 2017-2023 .....	179
18.7.2	Market Dynamics 2017-2023.....	180
18.7.3	Market Breakdown 2017-2023 .....	181
<b>19</b>	<b>Spain Counter-Drone Market – 2018-2023 .....</b>	<b>181</b>
19.1	Facts & Figures 2018.....	181
19.2	Spain National Security Risk Assessment 2018 .....	181
19.3	Spain Major Homeland Security and Public Safety Organizations.....	183
19.3.1	Spain Homeland Security & Public Safety Agencies Organogram .....	183
19.3.2	Security and Intelligence Agencies.....	184
19.4	Spain Homeland Security & Public Safety Market: Business Opportunities .....	184
19.5	Spain Homeland Security & Public Safety: Market Drivers .....	185
19.6	Spain Homeland Security & Public Safety: Market Inhibitors .....	187
19.7	Spain Counter-Drone Market 2018-2023.....	187
19.7.1	Market Size – Assessment and Forecast – 2017-2023 .....	187
19.7.2	Market Dynamics 2017-2023.....	188
19.7.3	Market Breakdown 2017-2023 .....	189
	<b>Asia Pacific.....</b>	<b>190</b>
<b>20</b>	<b>Australia Counter-Drone Market – 2018-2023 .....</b>	<b>190</b>
20.1	Facts & Figures 2018.....	190
20.2	Australia National Security Risk Assessment 2018.....	190
20.2.1	Crime in Australia .....	191
20.2.2	Terror in Australia .....	191
20.3	Australia Homeland Security & Public Safety Agencies.....	192
20.3.1	Australia - Police Forces.....	194
20.3.2	Australia Intelligent Services .....	195
20.4	Australia Homeland Security & Public Safety Market: Business Opportunities .....	195
20.5	Australia Homeland Security & Public Safety: Market Drivers .....	196
20.6	Australia Homeland Security & Public Safety: Market Inhibitors .....	197
20.7	Australia Counter-Drone Market 2018-2023 .....	198
20.7.1	Market Size – Assessment and Forecast – 2017-2023 .....	198

20.7.2	Market Dynamics 2017-2023.....	199
20.7.3	Market Breakdown 2017-2023 .....	200
<b>21</b>	<b>India Counter-Drone Market – 2018-2023 .....</b>	<b>200</b>
21.1	Facts & Figures 2018.....	200
21.2	India National Security Risk Assessment 2018.....	200
21.2.1	Terror in India .....	201
21.2.2	India Homeland Security & Public Safety Agencies .....	202
21.2.3	Indian Police Forces .....	202
21.3	India Homeland Security & Public Safety Market: Business Opportunities .....	204
21.4	India Homeland Security & Public Safety: Market Drivers .....	205
21.5	India Homeland Security & Public Safety: Market Inhibitors .....	207
21.6	India Counter-Drone Market 2018-2023 .....	207
21.6.1	Market Size – Assessment and Forecast – 2017-2023 .....	207
21.6.2	Market Dynamics 2017-2023.....	208
21.6.3	Market Breakdown 2017-2023 .....	209
<b>22</b>	<b>China Counter-Drone Market – 2018-2023.....</b>	<b>209</b>
22.1	Facts & Figures 2018.....	209
22.2	China National Security Risk Assessment 2018 .....	209
22.2.1	Crime in China.....	210
22.2.2	Terror in China .....	211
22.3	China Major Homeland Security and Public Safety Organizations.....	212
22.3.1	China Homeland Security & Public Safety Agencies Organogram .....	213
22.3.2	China Police .....	214
22.3.3	China Ministry of Public Security .....	214
22.3.4	Public Security Bureau .....	215
22.3.5	China Ministry of State Security .....	215
22.4	China Homeland Security & Public Safety Market: Business Opportunities .....	216
22.5	China Homeland Security & Public Safety: Market Drivers.....	218
22.6	China Homeland Security & Public Safety: Market Inhibitors.....	219
22.7	China Counter-Drone Market 2018-2023.....	220
22.7.1	Market Size – Assessment and Forecast – 2017-2023 .....	220
22.7.2	Market Dynamics 2017-2023.....	221
22.7.3	Market Breakdown 2017-2023 .....	221
<b>23</b>	<b>South Korea Counter-Drone Market – 2018-2023 .....</b>	<b>222</b>
23.1	Facts & Figures 2018.....	222
23.2	South Korea National Security Assessment 2018.....	222
23.2.1	Crime in South Korea .....	222
23.2.2	Terror in South Korea.....	223
23.2.3	South Korea Homeland Security & Public Safety Agencies.....	223
23.2.4	South Korea Police Forces.....	224

23.2.5	South Korea Defense Forces .....	226
23.3	South Korea Homeland Security & Public Safety Market: Business Opportunities .....	226
23.4	South Korea Homeland Security & Public Safety: Market Drivers .....	227
23.5	South Korea Homeland Security & Public Safety: Market Inhibitors .....	228
23.6	South Korea Counter-Drone Market 2018-2023 .....	229
23.6.1	Market Size – Assessment and Forecast – 2017-2023 .....	229
23.6.2	Market Dynamics 2017-2023.....	230
23.6.3	Market Breakdown 2017-2023 .....	231
<b>24</b>	<b>Japan Counter-Drone Market – 2018-2023 .....</b>	<b>231</b>
24.1	Facts & Figures 2018.....	231
24.2	Japan National Security Risk Assessment 2018.....	231
24.2.1	Crime in Japan .....	232
24.2.2	Terror in Japan .....	232
24.3	Japan Major Homeland Security and Public Safety Organizations.....	233
24.3.1	Japan Homeland Security & Public Safety Agencies Organogram .....	233
24.3.2	Japan Police Forces .....	234
24.3.3	Japan Defense Forces .....	234
24.4	Japan Homeland Security & Public Safety Market: Business Opportunities .....	235
24.5	Japan Homeland Security & Public Safety: Market Drivers .....	236
24.6	Japan Homeland Security & Public Safety: Market Inhibitors .....	238
24.7	Japan Counter-Drone Market 2018-2023 .....	239
24.7.1	Market Size – Assessment and Forecast – 2017-2023 .....	239
24.7.2	Market Dynamics 2017-2023.....	240
24.7.3	Market Breakdown 2017-2023 .....	240
	<b>Latin America .....</b>	<b>241</b>
<b>25</b>	<b>Brazil Counter-Drone Market – 2018-2023.....</b>	<b>241</b>
25.1	Facts & Figures 2018.....	241
25.2	Brazil National Security Assessment 2018 .....	241
25.3	Brazil Homeland Security & Public Safety Agencies.....	242
25.4	Brazil Homeland Security & Public Safety Market: Business Opportunities .....	242
25.5	Brazil Homeland Security & Public Safety: Market Drivers .....	244
25.6	Brazil Homeland Security & Public Safety: Market Inhibitors .....	244
25.7	Brazil Counter-Drone Market – 2018-2023 .....	245
25.7.1	Market Size – Assessment and Forecast – 2017-2023 .....	245
25.7.2	Market Dynamics 2017-2023.....	246
25.7.3	Market Breakdown 2017-2023 .....	246
<b>26</b>	<b>Mexico Counter-Drone Market – 2018-2023.....</b>	<b>247</b>

26.1	Facts & Figures 2018.....	247
26.2	Mexico National Security Assessment 2018 .....	247
26.3	Mexico Homeland Security & Public Safety Agencies .....	248
26.4	Mexico Homeland Security & Public Safety Market: Business Opportunities .....	248
26.5	Mexico Homeland Security & Public Safety: Market Drivers .....	250
26.6	Mexico Homeland Security & Public Safety: Market Inhibitors .....	251
26.7	Mexico Counter-Drone Market 2018-2023 .....	252
26.7.1	Market Size – Assessment and Forecast – 2017-2023 .....	252
26.7.2	Market Dynamics 2017-2023.....	253
26.7.3	Market Breakdown 2017-2023 .....	253
<b>27</b>	<b>Colombia Counter-Drone Market – 2018-2023 .....</b>	<b>254</b>
27.1	Facts & Figures 2018.....	254
27.2	Colombia National Security Assessment 2018 .....	254
27.3	Colombia Major Homeland Security and Public Safety Organizations.....	254
27.3.1	National Police .....	254
27.3.2	Law Enforcement .....	255
27.4	Colombia Homeland Security & Public Safety Market: Business Opportunities .....	255
27.5	Colombia Homeland Security & Public Safety: Market Drivers .....	256
27.6	Colombia Homeland Security & Public Safety: Market Inhibitors .....	257
27.7	Colombia Counter-Drone Market 2018-2023 .....	258
27.7.1	Market Size – Assessment and Forecast – 2017-2023 .....	258
27.7.2	Market Dynamics 2017-2023.....	259
27.7.3	Market Breakdown 2017-2023 .....	260
	<b>Middle East and Africa .....</b>	<b>261</b>
<b>28</b>	<b>GCC (Gulf Cooperation Council) Counter-Drone Market – 2018-2023 .....</b>	<b>261</b>
28.1	GCC National Security Assessment for 2018 .....	261
28.1.1	Saudi Arabia Country Assessment.....	261
28.1.2	UAE Country Assessment.....	261
28.1.3	Kuwait Country Assessment.....	262
28.1.4	Bahrain Country Assessment.....	262
28.2	GCC Major Homeland Security and Public Safety Organizations.....	263
28.2.1	Saudi Arabia Government Security Organogram .....	263
28.2.2	UAE Homeland Security & Public Safety Agencies Organogram .....	264
28.2.3	Kuwait Homeland Security & Public Safety Agencies .....	264
28.2.4	Bahrain Homeland Security & Public Safety Agencies.....	265
28.3	GCC Counter-Drone Market 2018-2023 .....	266

28.3.1	Market Size – Assessment and Forecast – 2017-2023 .....	266
28.3.2	Market Dynamics 2017-2023.....	267
28.3.3	Market Breakdown 2017-2023 .....	267
<b>29</b>	<b>South Africa Counter-Drone Market – 2018-2023 .....</b>	<b>268</b>
29.1	Facts & Figures 2018.....	268
29.2	South Africa National Security Assessment 2018 .....	268
29.2.1	Crime in South Africa.....	268
29.2.2	Terror in South Africa .....	270
29.3	South Africa Major Homeland Security and Public Safety Organizations.....	270
29.3.1	State Security Agency .....	270
29.3.1.1	State Security Agency Organogram .....	271
29.3.2	The South African Police .....	271
29.3.3	South African Defense Forces.....	272
29.4	South Africa Homeland Security & Public Safety Market: Business Opportunities .....	273
29.5	South Africa Homeland Security & Public Safety: Market Drivers .....	274
29.6	South Africa Homeland Security & Public Safety: Market Inhibitors .....	274
29.7	South Africa Counter-Drone Market 2018-2023.....	275
29.7.1	Market Size – Assessment and Forecast – 2017-2023 .....	275
29.7.2	Market Dynamics 2017-2023.....	276
29.7.3	Market Breakdown 2017-2023 .....	276
<b>30</b>	<b>Kenya Counter-Drone Market – 2018-2023.....</b>	<b>276</b>
30.1	Kenya National Security Assessment 2018 .....	276
30.2	Kenya Major Homeland Security and Public Safety Organizations.....	277
30.2.1	Ministry of Interior.....	277
30.3	Kenya Counter-Drone Market 2018-2023.....	277
30.3.1	Market Size – Assessment and Forecast – 2017-2023 .....	277
30.3.2	Market Dynamics 2017-2023.....	278
30.3.3	Market Breakdown 2017-2023 .....	279
<b>31</b>	<b>Nigeria Counter-Drone Market – 2018-2023.....</b>	<b>279</b>
31.1	Facts & Figures 2018.....	279
31.2	Nigeria National Security Assessment 2018 .....	279
31.2.1	Crime in Nigeria.....	280
31.2.2	Terror in Nigeria .....	280
31.2.3	Nigeria Internal Security & Public Safety Agencies .....	282
31.2.4	The Nigerian Police Forces .....	282
31.2.4.1	Nigeria Police Force (NPF).....	282
31.2.4.2	Other Departments .....	284
31.2.5	Nigeria Defense Forces.....	285
31.3	Nigeria Internal Security & Public Safety Market: Business Opportunities .....	285

31.4	Nigeria Internal Security & Public Safety: Market Drivers .....	286
31.5	Nigeria Internal Security & Public Safety: Market Inhibitors .....	288
31.6	Nigeria Counter-Drone Market 2018-2023 .....	288
31.6.1	Market Size – Assessment and Forecast – 2017-2023 .....	288
31.6.2	Market Dynamics 2017-2023.....	289
31.6.3	Market Breakdown 2017-2023 .....	290
<b>32</b>	<b>Vendors .....</b>	<b>291</b>
32.1	Integrative Systems .....	291
32.1.1	Aaronia AG.....	292
32.1.1.1	Company Profile .....	292
32.1.1.2	Counter-Drone Products and Solutions .....	293
32.1.1.3	Recent Events (contracts, investments, etc.).....	293
32.1.2	Black Sage .....	294
32.1.2.1	Company profile.....	294
32.1.2.2	Counter-Drone Products and Solutions .....	294
32.1.3	Brighter Surveillance Systems.....	295
32.1.3.1	Company profile.....	295
32.1.3.2	Counter-Drone Products and Solutions .....	295
32.1.3.3	Recent Events (contracts, investments, etc.).....	296
32.1.4	CERBAIR .....	296
32.1.4.1	Company Profile .....	296
32.1.4.2	Counter-Drone Products and Solutions .....	296
32.1.4.3	Recent Events (contracts, investments, etc.).....	297
32.1.5	Drone Detection Sys.....	297
32.1.5.1	Company Profile .....	297
32.1.5.2	Counter-Drone Products and Solutions .....	298
32.1.6	DroneShield.....	298
32.1.6.1	Company Profile .....	298
32.1.6.2	Counter-Drone Products and Solutions .....	298
32.1.6.3	Recent Events (contracts, investments, etc.).....	299
32.1.7	Gryphon Sensors .....	299
32.1.7.1	Company Profile .....	299
32.1.7.2	Counter-Drone Products and Solutions .....	300
32.1.8	Hensoldt .....	300
32.1.8.1	Company Profile .....	300
32.1.8.2	Counter-Drone Products and Solutions .....	301
32.1.9	Kelvin Hughes .....	301
32.1.9.1	Company Profile .....	301
32.1.10	Counter-Drone Products and Solutions .....	302
32.1.11	Lokmas.....	303
32.1.11.1	Company Profile .....	303
32.1.11.2	Counter-Drone Products and Solutions .....	303
32.1.12	Rafael.....	303
32.1.12.1	Company Profile .....	303
32.1.12.2	Counter-Drone Products and Solutions .....	304
32.1.13	Selex ES Inc - Leonardo.....	305

32.1.13.1	Company profile.....	305
32.1.13.2	Counter-Drone Products and Solutions .....	305
32.1.13.3	Recent Events (contracts, investments, etc.).....	305
32.1.14	SRC Inc.....	306
32.1.14.1	Company Profile .....	306
32.1.14.2	Counter-Drone Products and Solutions .....	307
32.1.14.3	Recent Events (contracts, investments, etc.).....	307
32.1.15	TeleRadio Engineering Pte Ltd.....	307
32.1.15.1	Company Profile .....	307
32.1.15.2	Counter-Drone Products and Solutions .....	308
32.2	RF-based Solutions .....	308
32.2.1	ARTsys360.....	309
32.2.1.1	Company Profile .....	309
32.2.1.2	Counter-Drone Products and Solutions .....	310
32.2.2	Dedrone.....	310
32.2.2.1	Company profile.....	310
	Headquarters: San Francisco, USA. ....	310
32.2.2.2	Counter-Drone Products and Solutions .....	311
32.2.3	Department13.....	312
32.2.3.1	Company Profile .....	312
32.2.3.2	Counter-Drone Products and Solutions .....	312
32.2.3.3	Recent Events (contracts, investments, etc.).....	312
32.2.4	Elbit Systems.....	313
32.2.4.1	Company Profile .....	313
32.2.4.2	Counter-Drone Products and Solutions .....	313
32.2.5	MyDefense .....	313
32.2.5.1	Company Profile .....	313
32.2.5.2	Counter-Drone Products and Solutions .....	314
32.2.6	Rohde & Schwarz.....	315
32.2.6.1	Company Profile .....	315
32.2.6.2	Counter-Drone Products and Solutions .....	315
32.2.7	Sensofusion.....	315
32.2.7.1	Company Profile .....	315
32.2.7.2	Counter-Drone Products and Solutions .....	316
32.2.7.3	Recent Events (contracts, investments, etc.).....	316
32.2.8	Skysafe.....	317
32.2.8.1	Company Profile .....	317
32.2.8.2	Counter-Drone Products and Solutions .....	317
32.2.8.3	Recent Events (contracts, investments, etc.).....	317
32.2.9	WhiteFox Defense Technologies, Inc. ....	318
32.2.9.1	Company Profile .....	318
32.2.9.2	Counter-Drone Products and Solutions .....	318
32.3	Radar-based Solutions .....	318
32.3.1	Accipiter.....	319
32.3.1.1	Company Profile .....	319
32.3.1.2	Counter-Drone Products and Solutions .....	320

32.3.2	Advanced Radar Technologies .....	320
32.3.2.1	Company Profile .....	320
32.3.2.2	Counter-Drone Products and Solutions .....	320
32.3.3	AVEILLANT .....	321
32.3.3.1	Company Profile .....	321
32.3.3.2	Counter-Drone Products and Solutions .....	321
32.3.4	DeTect.....	322
32.3.4.1	Company Profile .....	322
32.3.4.2	Counter-Drone Products and Solutions .....	322
32.3.4.3	Recent Events (contracts, investments, etc.).....	323
32.3.5	MAGOS Systems .....	323
32.3.5.1	Company Profile .....	323
32.3.5.2	Counter-Drone Products and Solutions .....	323
32.3.6	Robin Radar Systems.....	324
32.3.6.1	Company Profile .....	324
32.3.6.2	Counter-Drone Products and Solutions .....	325
32.3.7	Thales Group.....	325
32.3.7.1	Company Profile .....	325
32.3.7.2	Counter-Drone Products and Solutions .....	325
32.4	Mobile Jammers.....	326
32.4.1	Battelle Memorial Institute .....	326
32.4.1.1	Company Profile .....	326
32.4.1.2	Counter-Drone Products and Solutions .....	327
32.4.2	Radio Hill Technologies.....	327
32.4.2.1	Company Profile .....	327
32.4.2.2	Counter-Drone Products and Solutions .....	327
32.4.2.3	Recent Events (contracts, investments, etc.).....	328
32.4.3	SteelRock UAV.....	328
32.4.3.1	Company Profile .....	328
32.4.3.2	Counter-Drone Products and Solutions .....	328
32.4.4	Zala Aero Group.....	329
32.4.4.1	Company Profile .....	329
32.4.4.2	Counter-Drone Products and Solutions .....	329
32.5	Interception Solutions .....	330
32.5.1	Airspace Systems.....	330
32.5.1.1	Company Profile .....	330
32.5.1.2	Counter-Drone Products and Solutions .....	330
32.5.1.3	Recent Events (contracts, investments, etc.).....	331
32.5.2	OpenWorks engineering.....	331
32.5.2.1	Company Profile .....	331
32.5.2.2	Counter-Drone Products and Solutions .....	331
32.5.2.3	Recent Events (contracts, investments, etc.).....	332
<b>33</b>	<b>Research Methodology .....</b>	<b>333</b>
33.1	Report Structure.....	333
33.2	Research Methodology .....	333
33.3	For Whom is This Report? .....	334



**34 Disclaimer & Copyright.....335**

List of Tables

Table 1 – Global Counter-Drone Market Size (\$M) and Annual Growth Rates (%) – 2017-2023..... 26

Table 2 - Detection & Tracking Technologies – Benchmark ..... 51

Table 3 - Countermeasures Technologies – Benchmark ..... 53

Table 4 – Fixed System Configuration Market Size (\$M) and Annual Growth Rates (%) 2017-2023 ..... 57

Table 5 – Mobile System Configuration Market Size (\$M) and Annual Growth Rates (%) 2017-2023 ..... 59

Table 6 – Detection & Mitigation Market Size (\$M) and Annual Growth Rates (%) 2017-2023..... 61

Table 7 – Detection Only Market Size (\$M) and Annual Growth Rates (%) 2017-2023..... 63

Table 8 – Global Counter-Drone Market (\$M) by Vertical Market 2017-2023 ..... 66

Table 9 – Global Counter-Drone Market (\$M) and CAGR (%) by Vertical Market 2017, 2023..... 67

Table 10 - Global Counter-Drone Market Annual Growth Rate (%) by Vertical 2017-2023..... 67

Table 11 – Global Counter-Drone Market Share (%) by Vertical 2017-2023 ..... 68

Table 12 – Global Counter-Drone Cumulative Market (\$M) and Cumulative Market Share (%) by Vertical Market 2017-2023 ..... 69

Table 13 - Defense Drone Incidents ..... 71

Table 14 – DoD Counter-Drone Equipment Purchases ..... 72

Table 15 – Defense Vertical Market Size (\$M) and Annual Growth Rates (%) 2017-2023 ..... 73

Table 16 – Airport Security Drone Incidents ..... 76

Table 17 – Airport Security Vertical Market Size (\$M) and Annual Growth Rates (%) 2017-2023..... 78

Table 18– Public Events Drone Incidents ..... 80

Table 19 – Public Events Security Vertical Market Size (\$M) and Annual Growth Rates (%) 2017-2023 ..... 81

Table 20 – Border Security Drone Incidents ..... 83

Table 21 – Aerial Vertical Market Size (\$M) and Annual Growth Rates (%) 2017-2023..... 85

Table 22 – Critical Infrastructure Drone Incidents ..... 88

Table 23 – Critical Infrastructure Vertical Market Size (\$M) and Annual Growth Rates (%) 2017-2023 ..... 89

Table 24 – Correctional Facilities Drone Incidents..... 91

Table 25 – Correctional Facilities Vertical Market Size (\$M) and Annual Growth Rates (%) 2017-2023 ..... 92

Table 26 – Private Facilities Vertical Market Size (\$M) and Annual Growth Rates (%) 2017-2023..... 95

Table 27 – Private Facilities - Drone Incidents..... 96

Table 28 – Policing Drone Incidents ..... 97

Table 29 – VIP Protection - Drone Incidents ..... 98

Table 30 – Other Vertical Markets Market Size (\$M) and Annual Growth Rates (%) 2017-2023.....	99
Table 31 – Customers Showing Interest in Counter-Drone Products.....	102
Table 32 – Customers Showing Interest in Counter-Drone Products.....	104
Table 33– Customers Showing Interest in Counter-Drone Products.....	105
Table 34 – Customers Showing Interest in Counter-Drone Products.....	106
Table 35– Customers Showing Interest in Counter-Drone Products.....	108
Table 36 - Global Counter-Drone Market Size (\$M) by Region 2017-2023 .....	109
Table 37 - Global Counter-Drone Market Size (\$M) and Compound Annual Growth Rate (%) by Region 2017, 2023 .....	110
Table 38 - Global Counter-Drone Cumulative Market Size (\$M) and Market Share (%) by Region 2017-2023 .....	111
Table 39 - Global Counter-Drone Market Share (%) by Region 2017-2023.....	111
Table 40 - Global Counter-Drone Market Size (\$M) by Country 2019-2023 .....	113
Table 41 - Global Counter-Drone Market Size (\$M) and Compound Annual Growth Rate (%) by County 2019, 2023 .....	114
Table 42 - Global Counter-Drone Market Annual Growth Rate (%) by Country 2019-2023 .....	116
Table 43 - Global Counter-Drone Market Share (%) by Country 2019-2023 ....	116
Table 44 - Global Counter-Drone Cumulative Market (\$M) and Market Share (%) by Country 2019-2023 .....	118
Table 45 - U.S. Homeland Security & Public Safety Market Business Opportunities .....	126
Table 46 - USA Counter-Drone Market Size (\$M) and Annual Growth Rates (%) 2017-2023 .....	131
Table 47 - Canada Homeland Security & Public Safety Market Business Opportunities .....	135
Table 48 - Canada Counter-Drone Market Size (\$M) and Annual Growth Rates (%) 2017-2023.....	140
Table 49 - Germany Homeland Security & Public Safety Market Business Opportunities .....	146
Table 50 - Germany Counter-Drone Market Size (\$M) and Annual Growth Rates (%) 2017-2023.....	150
Table 51 - France Homeland Security & Public Safety Market Business Opportunities .....	155
Table 52 - France Counter-Drone Market Size (\$M) and Annual Growth Rates (%) 2017-2023.....	158
Table 53 - UK Investment in Cross-Governmental Counter Terrorism Capabilities .....	164
Table 54 - UK Homeland Security & Public Safety Market Business Opportunities .....	167
Table 55 - UK Counter-Drone Market Size (\$M) and Annual Growth Rates (%) 2017-2023 .....	171
Table 56 - Italy Homeland Security & Public Safety Market Business .....	176
Table 57 - Italy Counter-Drone Market Size (\$M) and Annual Growth Rates (%) 2017-2023 .....	180

Table 58 - Spain Homeland Security & Public Safety Market Business Opportunities .....	184
Table 59 - Spain Counter-Drone Market Size (\$M) and Annual Growth Rates (%) 2017-2023.....	187
Table 60 - Australia Homeland Security & Public Safety Market: Business Opportunities .....	195
Table 61 - Australia Counter-Drone Market Size (\$M) and Annual Growth Rates (%) 2017-2023.....	199
Table 62 - India Homeland Security & Public Safety Market: Business Opportunities .....	204
Table 63 - India Counter-Drone Market Size (\$M) and Annual Growth Rates (%) 2017-2023.....	207
Table 64 - China Homeland Security & Public Safety Market: Business Opportunities .....	217
Table 65 - China Counter-Drone Market Size (\$M) and Annual Growth Rates (%) 2017-2023.....	220
Table 66 - South Korea Homeland Security & Public Safety Market: Business Opportunities .....	226
Table 67 – South Korea Counter-Drone Market Size (\$M) and Annual Growth Rates (%) 2017-2023 .....	229
Table 68 - Japan Homeland Security & Public Safety Market: Business Opportunities .....	235
Table 69 – Japan Counter-Drone Market Size (\$M) and Annual Growth Rates (%) 2017-2023.....	239
Table 70 - Brazil Homeland Security & Public Safety Market: Business Opportunities .....	242
Table 71 – Brazil Counter-Drone Market Size (\$M) and Annual Growth Rates (%) 2017-2023.....	245
Table 72 - Mexico Homeland Security & Public Safety Market: Business Opportunities .....	249
Table 73 – Mexico Counter-Drone Market Size (\$M) and Annual Growth Rates (%) 2017-2023.....	252
Table 74 - Colombia Homeland Security & Public Safety Market: Business Opportunities .....	255
Table 75 – Colombia Counter-Drone Market Size (\$M) and Annual Growth Rates (%) 2017-2023.....	258
Table 76 – GCC Counter-Drone Market Size (\$M) and Annual Growth Rates (%) 2017-2023.....	266
Table 77 - South Africa Homeland Security & Public Safety Market Business Opportunities .....	273
Table 78 – South Africa Counter-Drone Market Size (\$M) and Annual Growth Rates (%) 2017-2023 .....	275
Table 79 – Kenya Counter-Drone Market Size (\$M) and Annual Growth Rates (%) 2017-2023.....	277
Table 80 - Nigeria Police Departments & Responsibilities .....	282

Table 81 - Nigeria Internal Security & Public Safety Market Business Opportunities .....	285
Table 82 – Kenya Counter-Drone Market Size (\$M) and Annual Growth Rates (%) 2017-2023.....	288
Table 83 – Integrative Systems Comparison .....	291
Table 84 – RF-based Solutions Comparison .....	308
Table 85 – Radar-based Solutions Comparison .....	318
Table 86 – Mobile Jammers Comparison .....	326
Table 87 – Interception Solutions Comparison .....	330

## List of Figures

Figure 1 – Counter-Drone Market Size (\$M) – 2017-2023.....	27
Figure 2 – Global Counter-Drone Market Annual Growth Rate (%) 2017-2023.....	27
Figure 3 – Global Counter-Drone Market (\$M) by Region 2017-2023 .....	28
Figure 4 - Global Counter-Drone Market (\$M) by Country 2019-2023.....	28
Figure 5 - Global Counter-Drone Market (\$M) by Vertical Market 2017-2023.....	29
Figure 6 - Global Counter-Drone Market (\$M) by System Configuration 2017-2023.....	29
Figure 7 - Global Counter-Drone Market (\$M) by Purpose 2017-2023 .....	29
Figure 8 - Global Risks Landscape 2018 .....	32
Figure 9 - Top Global Risks by Impact and Likelihood.....	33
Figure 10 - The Risks-Trends Interconnections Map 2018 .....	33
Figure 11 - The Global Risks Interconnections Map 2018 .....	35
Figure 12 - Top 5 Risks of Doing Business in the North America .....	36
Figure 13 - Top 5 Risks to Doing Business in Europe.....	38
Figure 14 - Europe Major Terror Attacks - 2001 - March 2017 .....	40
Figure 15 - Top 5 Risks to Doing Business in East Asia and the Pacific.....	41
Figure 16 - Top 5 Risks to Doing Business in South Asia.....	42
Figure 17 - Top 5 Risks to Doing Business in Latin America and the Caribbean .....	43
Figure 18 - Major Drug Trafficking Routes and Major Gold Mining Areas in Latin America.....	44
Figure 19 - Top 5 Risks to Doing Business in Middle East and North Africa.....	45
Figure 20 - Top 5 Risks to Doing Business in Sub-Saharan Africa .....	46
Figure 21 – Counter-Drone Solutions by Detection & Tracking Technology .....	52
Figure 22 – Counter-Drone Solutions by Countermeasure Technology.....	54
Figure 23 – Counter-Drone Solutions by Platform Type .....	56
Figure 24 - Fixed System Configuration Market Size (\$M) 2017-2023 .....	57
Figure 25 - Fixed System Configuration Market AGR (%) 2017-2023 .....	58
Figure 26 - Fixed System Configuration Market Share (%) 2017-2023.....	58
Figure 27 - Mobile System Configuration Market Size (\$M) 2017-2023.....	59
Figure 28 - Mobile System Configuration Market AGR (%) 2017-2023.....	59
Figure 29 - Mobile System Configuration Market Share (%) 2017-2023.....	60
Figure 30 – Detection & Mitigation Market Size (\$M) 2017-2023.....	62
Figure 31 – Detection & Mitigation Market AGR (%) 2017-2023.....	62
Figure 32 – Detection & Mitigation Market Share (%) 2017-2023.....	63
Figure 33 – Detection Only Market Size (\$M) 2017-2023 .....	64
Figure 34 – Detection Only Market AGR (%) 2017-2023 .....	64
Figure 35 – Detection Only Market Share (%) 2017-2023 .....	65
Figure 36 – Global Counter-Drone Market (\$M) by Vertical Market 2017-2023.....	66
Figure 37 – Global Counter-Drone Market Share (%) by Vertical Market 2017-2023.....	68

Figure 38 - Global Counter-Drone Market (\$M) and Cumulative Market Share (%) by Vertical Market 2017-2023 .....	69
Figure 39 - Defense Vertical Market Size (\$M) 2017-2023 .....	74
Figure 40 - Defense Vertical Market AGR (%) 2017-2023 .....	74
Figure 41 - Defense Vertical Market Share (%) 2017-2023 .....	75
Figure 42 – Number of Airport Security Drone Incidents.....	76
Figure 43 – Airport Security Vertical Market Size (\$M) 2017-2023 .....	78
Figure 44 – Airport Security Vertical Market AGR (%) 2017-2023 .....	79
Figure 45 – Airport Security Vertical Market Share (%) 2017-2023 .....	79
Figure 46 – Public Events Security Vertical Market Size (\$M) 2017-2023 .....	81
Figure 47 – Public Events Security Vertical Market AGR (%) 2017-2023 .....	81
Figure 48 – Public Events Security Vertical Market Share (%) 2017-2023 .....	82
Figure 49 - Incendiary Kite Launched from Gaza Strip .....	84
Figure 50 – Aerial Vertical Market Size (\$M) 2017-2023 .....	86
Figure 51 – Public Events Security Vertical Market AGR (%) 2017-2023 .....	86
Figure 52 – Public Events Security Vertical Market Share (%) 2017-2023 .....	87
Figure 53 - Critical Infrastructure Vertical Market Size (\$M) 2017-2023 .....	90
Figure 54 - Critical Infrastructure Vertical Market AGR (%) 2017-2023 .....	90
Figure 55 - Critical Infrastructure Vertical Market Share (%) 2017-2023.....	91
Figure 56 – Correctional Facilities Vertical Market Size (\$M) 2017-2023 .....	93
Figure 57 - Correctional Facilities Vertical Market AGR (%) 2017-2023 .....	93
Figure 58 – Correctional Facilities Vertical Market Share (%) 2017-2023.....	94
Figure 59 – Private Facilities Vertical Market Size (\$M) 2017-2023.....	95
Figure 60 - Private Facilities Vertical Market AGR (%) 2017-2023 .....	95
Figure 61 – Correctional Facilities Vertical Market Share (%) 2017-2023.....	96
Figure 62 – Other Vertical Markets Market Size (\$M) 2017-2023 .....	99
Figure 63 - Other Vertical Markets AGR (%) 2017-2023.....	100
Figure 64 – Other Vertical Markets Market Share (%) 2017-2023 .....	100
Figure 65 – Prominent Opportunities .....	101
Figure 66 - Counter-Drone Market Size (\$M) by Region 2017-2023.....	109
Figure 67 – Global Counter-Drone Solutions Manufactures by Region .....	110
Figure 68 – Global Counter-Drone Solutions by Region .....	110
Figure 69 - Global Counter-Drone Cumulative Market Size (\$M) and Market Share (%) by Region 2017-2023 .....	111
Figure 70 - Global Counter-Drone Market Share (%) by Region 2017-2023 ....	112
Figure 71 - Global Counter-Drone Market (\$M) by Country 2019-2023 .....	114
Figure 72 – Global Counter-Drone Solutions Manufactures by Country .....	115
Figure 73 – Global Counter-Drone Solutions by Country .....	115
Figure 74 - Global Counter-Drone Market Share (%) by Country 2019-2023 ...	118
Figure 75 - Global Counter-Drone Cumulative Market (\$M) and Market Share (%) by Country 2019-2023 .....	120
Figure 76 - U.S. Federal Homeland Security Organogram .....	124
Figure 77 - U.S Department of Homeland Security Organizational Structure ...	126
Figure 78 - USA Counter-Drone Market Size (\$M) 2017-2023 .....	131
Figure 79 - USA Counter-Drone Market AGR (%) 2017-2023 .....	131
Figure 80 - USA Counter-Drone Market Share (%) 2017-2023 .....	132

Figure 81 - Canada Homeland Security & Public Safety Agencies Organogram.....	134
Figure 82 - Canada Counter-Drone Market Size (\$M) 2017-2023 .....	140
Figure 83 - Canada Counter-Drone Market AGR (%) 2017-2023 .....	141
Figure 84 - Canada Counter-Drone Market Share (%) 2017-2023 .....	141
Figure 85 - German Homeland Security & Public Safety Agencies Organogram.....	144
Figure 86 - Strategische Initiative Technik Budget 2014 – 2020 (M€).....	145
Figure 87 - Germany Counter-Drone Market Size (\$M) 2017-2023 .....	151
Figure 88 - Germany Counter-Drone Market AGR (%) 2017-2023 .....	151
Figure 89 - Germany Counter-Drone Market Share (%) 2017-2023 .....	152
Figure 90 - France Counter Terror & Public Safety Agencies Organogram .....	154
Figure 91 - France Counter-Drone Market Size (\$M) 2017-2023 .....	158
Figure 92 - France Counter-Drone Market AGR (%) 2017-2023 .....	159
Figure 93 - France Counter-Drone Market Share (%) 2017-2023.....	159
Figure 94 - UK Homeland Security & Public Safety Agencies Organogram .....	163
Figure 95 - UK Counter-Drone Market Size (\$M) 2017-2023.....	171
Figure 96 - UK Counter-Drone Market AGR (%) 2017-2023.....	172
Figure 97 - UK Counter-Drone Market Share (%) 2017-2023.....	172
Figure 98 - Italy Homeland Security & Public Safety Agencies Organogram....	175
Figure 99 - Italy Counter-Drone Market Size (\$M) 2017-2023 .....	180
Figure 100 - Italy Counter-Drone Market AGR (%) 2017-2023 .....	180
Figure 101 - Italy Counter-Drone Market Share (%) 2017-2023 .....	181
Figure 102 - Spain Homeland Security & Public Safety Agencies Organogram.....	183
Figure 103 - Spain Counter-Drone Market Size (\$M) 2017-2023 .....	188
Figure 104 - Spain Counter-Drone Market AGR (%) 2017-2023 .....	188
Figure 105 - Spain Counter-Drone Market Share (%) 2017-2023.....	189
Figure 106 - Australia Homeland Security & Public Safety Agencies Organogram.....	193
Figure 107 – Australia Counter-Drone Market Size (\$M) 2017-2023.....	199
Figure 108 - Australia Counter-Drone Market AGR (%) 2017-2023.....	199
Figure 109 - Australia Counter-Drone Market Share (%) 2017-2023.....	200
Figure 110 - India Homeland Security & Public Safety Agencies Organogram.....	202
Figure 111 – India Counter-Drone Market Size (\$M) 2017-2023 .....	208
Figure 112 - India Counter-Drone Market AGR (%) 2017-2023.....	208
Figure 113 - India Counter-Drone Market Share (%) 2017-2023 .....	209
Figure 114 - China Homeland Security & Public Safety Agencies Organogram.....	213
Figure 115 – China Counter-Drone Market Size (\$M) 2017-2023 .....	220
Figure 116 - China Counter-Drone Market AGR (%) 2017-2023 .....	221
Figure 117 - China Counter-Drone Market Share (%) 2017-2023 .....	221
Figure 118 - South Korea Homeland Security & Public Safety Agencies Organogram.....	223
Figure 119 – South Korea Counter-Drone Market Size (\$M) 2017-2023 .....	230



Figure 120 – South Korea Counter-Drone Market AGR (%) 2017-2023 .....	230
Figure 121 – South Korea Counter-Drone Market Share (%) 2017-2023 .....	231
Figure 122 - Japan Homeland Security & Public Safety Agencies Organogram.....	233
Figure 123 – Japan Counter-Drone Market Size (\$M) 2017-2023 .....	239
Figure 124 – Japan Counter-Drone Market AGR (%) 2017-2023 .....	240
Figure 125 – Japan Counter-Drone Market Share (%) 2017-2023 .....	240
Figure 126 - Brazil Homeland Security & Public Safety Agencies Organogram.....	242
Figure 127 – Brazil Counter-Drone Market Size (\$M) 2017-2023 .....	245
Figure 128 – Brazil Counter-Drone Market AGR (%) 2017-2023 .....	246
Figure 129 – Brazil Counter-Drone Market Share (%) 2017-2023 .....	246
Figure 130 - Mexico Homeland Security & Public Safety Agencies Organogram.....	248
Figure 131 – Mexico Counter-Drone Market Size (\$M) 2017-2023.....	252
Figure 132 – Mexico Counter-Drone Market AGR (%) 2017-2023.....	253
Figure 133 – Mexico Counter-Drone Market Share (%) 2017-2023.....	253
Figure 134 – Colombia Counter-Drone Market Size (\$M) 2017-2023.....	259
Figure 135 – Colombia Counter-Drone Market AGR (%) 2017-2023.....	259
Figure 136 – Colombia Counter-Drone Market Share (%) 2017-2023.....	260
Figure 137 - Saudi Arabia Government Security Organogram .....	263
Figure 138 - UAE Homeland Security & Public Safety Agencies Organogram.....	264
Figure 139 – GCC Counter-Drone Market Size (\$M) 2017-2023.....	266
Figure 140 – GCC Counter-Drone Market AGR (%) 2017-2023.....	267
Figure 141 – GCC Counter-Drone Market Share (%) 2017-2023 .....	267
Figure 142 - South Africa State Security Agency Organogram .....	271
Figure 143 – South Africa Counter-Drone Market Size (\$M) 2017-2023 .....	275
Figure 144 – South Africa Counter-Drone Market AGR (%) 2017-2023 .....	276
Figure 145 – South Africa Counter-Drone Market Share (%) 2017-2023.....	276
Figure 146 – Kenya Counter-Drone Market Size (\$M) 2017-2023.....	278
Figure 147 – Kenya Counter-Drone Market AGR (%) 2017-2023.....	278
Figure 148 – Kenya Counter-Drone Market Share (%) 2017-2023 .....	279
Figure 149 – Nigeria Counter-Drone Market Size (\$M) 2017-2023.....	289
Figure 150 – Nigeria Counter-Drone Market AGR (%) 2017-2023.....	289
Figure 151 – Nigeria Counter-Drone Market Share (%) 2017-2023.....	290
Figure 152 - Map of Counter-Drone Market Players .....	291

# 1 Research Methodology

## 1.1 Report Structure

In order to provide in-depth, relevant information without compiling a work too voluminous to be of use, HSRC adhere to the following approach:

- ❑ Map an overall picture of the technologies and threats, and look at implementation and deployment patterns of each individual technology.
- ❑ Describe and analyze each technology from a number of perspectives, enabling the reader to quickly and easily focus on relevant material.

## 1.2 Research Methodology

HSRC research methodology used in this report is based on and crosschecked via dozens of orthogonal information sources that include the following elements:

- ❑ Our in-house (over 1 terabyte) database of the defense, public security and homeland security & public safety industry are updated daily (over the past 12 years).
- ❑ Our analysts played a leading role as R&D managers and marketing managers in the commercialization of dozens of security related products and Systems.
- ❑ Our analysts participate (since 1990) as attendees, speakers and chairpersons in hundreds of conferences and exhibitions.
- ❑ Use of in-house expertise of professional analysts, each of whom played an active role in the market before joining HSRC.
- ❑ Use of information collected during the consultation jobs we have performed in the past for hundreds of government agencies, and the private sector defense and security companies (while we retain the confidential information provided by these bodies, it provides us with a valuable general market and technology insight).
- ❑ We conduct face-to-face interviews with industry managers and experts during conferences and trade exhibitions.
- ❑ We extract data from government budgets and bidding (e.g., RFP) documentation.
- ❑ We created an “Old Boy Network” of experts and decision makers who agree to exchange information on a bilateral basis.
- ❑ Use of open source information sources such as SEC 10k documents provided by stock exchange traded companies.
- ❑ We review individual procurement contracts in several countries that provide the information under their “freedom of information” acts.

- ❑ Since members of our analysts team have held executive positions in the industry (e.g., chairman, board member, VP R&D, VP marketing, market & technology analyst) we have the know-how to focus on the relevant information needed by industry managers to take their decisions.
- ❑ We often participate as members in dozens of government and other (e.g., NATO) defense and homeland security advisory committees which provides us with a unique insight into the decision making process of the customers of homeland security & public safety products.

### 1.3 For Whom is This Report?

The report is designed to the following user groups:

- ❑ Security planners, directors, CSOs, public and private sector executives who require a concise, clear assessment of the performance, economics and operational aspects of the available Systems (including detailed examples).
- ❑ Homeland Security, Public Safety and Defense industry vendors that can focus on the OSINT market section to obtain a detailed description of the competitive landscape. The report provides a clear roadmap of the markets and technologies.

## 2 Disclaimer & Copyright

Quoting Homeland Security Research Corporation ("HSRC") Information and Data

**Internal Documents and Presentations** – Quoting individual sentences and paragraphs for use in your company's internal communications do not require permission from HSRC. The use of large portions or the reproduction of any HSRC document in entirety does require prior written approval and may involve some financial consideration.

**External Publication** – Any HSRC information that is to be used in advertising, press releases, or promotional materials requires prior written approval from the appropriate HSRC President or Country Manager. A Draft of the proposed document should accompany any such request. HSRC reserves the rights to deny approval of external usage for any reason.

### Exclusion of Warranties and Liabilities

Homeland Security Research Corporation ("HSRC") used its reasonable endeavor to provide information that is accurate. However, HSRC makes no representation or warranty as to the accuracy or completeness of any information provided. HSRC also expressly disclaims any representation or warranties that may be implied under applicable law, including, without limitation, any warranty of merchantability or fitness for a particular use.

HSRC is not liable for any loss or damage claimed to have resulted from the use by, or on behalf of, the client of any information or material furnished by HSRC, regardless of the circumstances or cause of action (including negligence), and the client shall hold HSRC harmless from, and indemnify it for, any loss, cost, or expense including reasonable attorneys' fees, suffered or incurred as a result of, or in connection with, any claim, suit, or action by the client or any third party relating to that use.

In no event (including negligence) will HSRC be liable for any indirect, special, consequential, or exemplary damages, even if HSRC was advised of the possibility of such damages, or for any damages in excess of the amount actually received by HSRC under this Agreement as of the date when the cause of action occur.

### Copyrighted © 2018, HSRC. All Rights Reserved.

No part of this publication may be reproduced, stored in a retrieval System or transmitted in any form or by any means, electronic, mechanical or by photocopying, recording, or otherwise, without prior written permission of Homeland Security Research Corporation.