

WORLDWIDE MILITARY UAS MANUFACTURING MARKET



2022

3rd Edition



Worldwide Military UAS Manufacturing Market

2012-2021, forecast to 2031



3rd Edition

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<http://ventura-associate.com>



Contacts:

General information:

reports@ventura-associate.com

22, avenue Duquesne 75007 Paris, France

+33 1 80 06 78 57

Alexandre Duflos, Associate, Editor

alexandre.duflos@ventura-associate.com

Eric Le Moulec, CEO Ventura Associates France

Eric.le-moulec@ventura-associate.com



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Scope of the report

The report “Worldwide Military UAS Manufacturing Market” presents estimates of the manufacturing market for military unmanned aerial systems purchased and to be purchased worldwide by armed forces only. It does not include civilian security forces such as police, firemen or private security services. The report includes coast guard and border control contingents providing that they are under military governance.



The report estimates the past market over a decade and displays a forecast of this market over the next decade. The year of publication of the report is considered as part of the forecast as all contracts nor their details are yet known.

The manufacturing market displayed represents an industrial turnover. It intends to monitor and oversee manufacturing industrial activities related to contracts passed by armed forces worldwide to equip their troops with UAS systems. Estimates do not include research and development programs but consider systems purchased for trial and upgrade/maintenance activities under known servicing contracts. Information used are from publicly available sources and reviewed by in-house expertise.

The manufacturing market or industrial turnover estimation is performed by compiling purchase contracts over the past decade, announced contracts or procurement programs for the next years and replacement/expansion contracts for the long term. Sources and information used for the market study are verified public information at the date of publication from countries administration, armed forces, manufacturers using press release of related actors or dedicated market analysis articles.

Summary of the market segments used in the report

Region	User	Class	Application	Market type	Contract status	Aircraft type	Propulsion type
• Asia	• Air Force	• I	• Cargo	• Domestic	• Contracted	• Fixed wing	• Electric
• Europe	• Army	• II	• ISR	• Import	• Backlog	• Helicopter	• Gas
• Latin America	• Navy/ Marines	• III	• Loitering Munition	• Techno Transfer	• Replacement	• Quad	• Jet
• MENA		• HALE	• Strike	• Open	• Expansion	• VTOL/ Hybrid	• Turboprop
• North America		• UCAV	• Training/ Trial				• Others
• Russia & Central Asia			• Wingman				
• Sub Saharan Africa							



Data overview

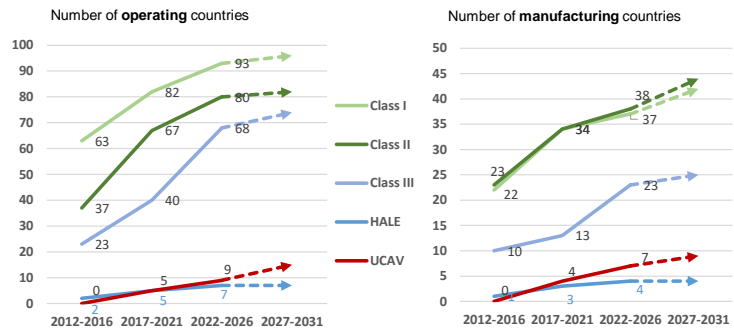
2506 lines of contracts are recorded in the database over 2012-2031. 836 of these contracts or a third of all the data, represent the past contracts over 2012-2021. The backlog or known and identified contracts in the future amounts for 34% of the data while representing about 50% of the global market forecast and run throughout all the future decade.

Higher classes UAS procurement, representing a higher turnover, are announced by governments well in advance as compared with smaller classes. The backlog however also includes near-term orders for all classes and middle-term planned procurements of small classes with continuous batch procurement programs such as the US Army “Short Range Reconnaissance” (SRR) and the FTUAS program. The replacement market accounts for 34% while the expansion market represents 16% of the forecast. A contracted market already exists in 2022.

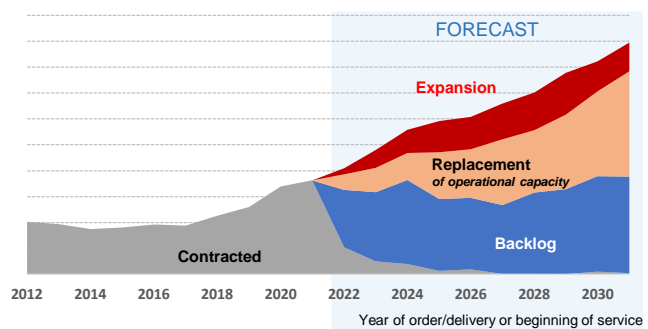
Contracts recorded for the study gather **119 countries** operating military UAS of any classes amongst their armed forces. 65 of these countries have a national manufacturing industry representing a growing 51% of nations operating national UAS for military missions. Over the two decades of the study, **198 manufacturers** are identified as supplying military armed forces with operational systems worldwide. 119 manufacturers provide class I systems, 75 companies provide class II systems while class III UAS are delivered to armed forces by 53 manufacturers. HALE and UCAV systems are more complex to manufactured and are the matter of respectively 6 et 12 companies only worldwide.

Over the same period, about **342 different models of UAS** were identified worldwide. 151 different models of class I UAS were or will be delivered, 106 models of class II and 62 models of class III while the number of HALE and UCAV models are more limited with 9 and 14 models delivered and to be delivered (...).

Number of countries per UAS class and periods of 5 years
2012-2016, 2017-2021, 2022-2026(F), trends to 2031



Database filling per type of manufacturing contract status
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- (Region) Military UAS Manufacturing Market per Class of UAS 2012-2021, forecasts to 2031
- (Region) Top Military UAS (...) National Markets 2012-2021 estimated, 2022-2031 forecasted
- (Region) Consolidated Market per Region of Manufacturing and per Type of Market 2012-2021
- (Region) Military UAS Manufacturing Market per Application 2012-2021, forecasts to 2031
- (Region) Military UAS Manufacturing Market per Propulsion 2012-2021, forecasts to 2031
- **[NEW] (Region) Top 10 Military UAS purchased per Class, 2017-2021 (...)**
- **[NEW] (Region) identified future UAS procurements per country and per Class (May 2022)**
- (North-America only) US R/MQ-1B, MQ_9A/B, MQ-1C losses per cause of incident 2010-2021
- (North-America only) US R/MQ-1B, MQ_9A/B, MQ-1C average prices per year of delivery 2002-2020



List of UAS procured 2012-2021 or known to be procured till 2031 per class and manufacturer

Class I	Bayraktar Mini	Drone Protect System
558th Aviation Repair Plant (ARZ)	Blue Bear	3S
Ubak-25 Chekan	Swarm	Drone Tools
AAI/Textron	Bluebird Aero	Condor
Aerosonde HQ	SpyLite	DTI
MQ-19 Aerosonde	WanderB	D-Eyes Mk1
Aeraccess	Boeing Insitu	ECA Group
Q800X	ScanEagle	IT180-3EL-I
Aeronautics	CASC	EDGE
Orbiter	CH-802	Hunter 2S
AeroVironment	CH-817	QX-5
RQ-11 Raven	CH-901	Edge Autonomy
RQ-12 Wasp	C-Astral	Penguin-C
RQ-20 Puma	Bramor	Elbit Systems
Snipe	Center for UAVs	Skylark
Switch-blade	Busel M Asuda Asman	Thor
AFM	China TranComm Technologies	Eniks
Ptero-5E	Sky-09P	Eleron-3SV
Alpha Unmanned Systems	CIACA	Flight Tech Sistemas
Alpha 800	ANT	FT-100 Horus
Alpi Aviation	CIDEP	GMV
Strix-D	Ricuk	Seeker
ARA Robotics	Columbian CIAC	Honeywell
NightHawk IV	Coelum	T-Hawk
Aselsan	CSIR	IdeaForge
Serce-1	Indiza	Switch 1.0
TOGAN	Datz Corporation	Innocon
Asseco	Darts	MicroFalcon
Wizjer	Def C	IRIAF
Assuva Defense Industries	Observer-S	Intelligent multirotor bomber
Proton Elic RB-128	Defentex	Izhmash-UAV
Athlone Air	Drone-40	Takhion
A1-S/M Fury	DELAIR	Jordan JODDB
Atlas Dynamics	DT-18	Quad
Atlas Pro	DT26E Surveillance	JSC Agat Control Systems
Aviation Systems of Ukraine	DeViro	Berkut-2 / Bekart-2 / 1LA-10K
ASU-1 Valkyrie	Leleka-100	JSC Meridian
AVK Skyeton	DJI	Spectator-M
ACS-3 Raybird	Agras MG-1	Kalashnikov
BAE, Raytheon	Inspire	KUB-BLA (KYB)
Silver Fox	Matrice 200	Leonardo
BAE/UAVTEK	Matrice 210	ASIO
Drone-40	Matrice 300 RTK	CREX-B
Nano 1A Bug	Mavic Pro	SPYBALL
Baykar Makina	Phantom	LFMT



MPU RX-4	HREESH	KX4-LE Titan
LIG nex1	PT Bhimasena	Tubitak/Asisguard
DCSD	SWG R-1 Marines	Eren
Lockheed Martin	Raytheon	UAV Solution
Desert Hawk Mk3	Coyotte	Phoenix 30
Indago 3	UAS Center of Uzbekistan	UAVision
Stalker	Lochin	Spyro
MAG Aerospace	Royal Thai Air Force	UconSystem
Super Swiper II	T-Eagle III	RemoEye-002B
Martin UAV	SCR	UDS
Super Bat DA 50	Tucan	Bat Hawk
Microfly Engineering Technology	Sky Sapience	UMS Skeldar
UV-10CAM	Hovermast 150	F-330
Mil Sistemika	Skydio	UAV Research Laboratory
Galeb	X2D	Ceyhawk
Military Aviation Institute	Sky-Watch	Unmanned Solutions
Baze	Huginn XI	Alcotan
Romania Military Research Agency	Smart Shooter	UTVA Aviation Industry
SACT Boreal 5	Smart Dragon	Vrabac
NajaF TU	Spaitech	UVision
Furat-1	Sparrow	Hero-120
NCSIST	Special Technology Center	Vietnam National Defense Industry
Cardinal	Orlan-10	VUA-QL-1
Chien Hsiang	Orlan-10/Leer	Viettel Corporation
Helicopter	ST Engineering	VT-Swift
National Defense University	Veloce V15	WB Electronics
Shagala	STM	FlyEye
New Energy	Alpagu	Warmate
Yatagan-2	Kargu-2	Yunec
NewSpace R&T	Kargu-2S	Typhoon H
Quad India	Supercam	Zata Aero Group
NORINCO	S-250	Zala 421 16E
MH40	Survey Copter	Zerotech
Novadem	Aliaca	ZT 10V
NX-110	Tracker 120	ZT 3V
NX-70	SYPAQ Systems	Ziyan
NPT MBK	Corvo X	Blowfish
Busel-MB	Tekever	
NRDO	AR3 Net Ray	
Narai 3.0	AR4 Light Ray	
Parrot	Teledyne Technologies / FLIR	Class II
ANAFI USA	System	431 Eng Group
Physical Sciences	Black Hornet	Tsaigumi
InstantEye	SkyRanger R60s	558th Aviation Repair Plant (ARZ)
Pride Systems	Thales	Ubak-70 Lovchiy
Attack Drone	Fulmar	AAI/Textron
Attack Quad	Spyranger	Aerosonde
ProMAQ	Threod systems	RQ-7 Shadow



ADASI	Aukan	IRIAF
Al Saber	Vigia 2A	Kaman-12
Aeronautics	Dronetech	Shahed 136 Kian
Aerostar	AV2 Pelican	JSC Agat Control Systems
Orbiter 3	DTI	Grif-K
Aerostar	Tiger Shark 2	JSC Display Design Bureau
Watchkeeper	EDGE	Quadro-1400
AFRDC	QX-6	JSC UWCA
Ichoku	Edge Autonomy	Forpost-M
Air Force Center for R&D	Penguin-C VTOL	Outpost-R/Searcher MkII
Lihiniya MK I	Elbit Systems	KAI
Lihiniya MK II	Gryf	Harop (Harpy 2)
Arab Org. for Industrialization	Hermes 450	RQ-102
Nutt	Sky Striker	Kalashnikov
Arcturus	Skylark	Granat-4
T-20 JUMP	Skylark 3	Leonardo
Armenian Armed Forces	Embention	Falco
X-55	AV2 Pelican	LFMT
Aselsan	EMT Penzberg	DELAER RX-3
KARGI	LUNA	Martin UAV
Bluebird Aero	LUNA NG	V-BAT
ThunderB	GIDS	NajaF TU
Boeing Insitu	Shahpar	Mohajer-92
RQ-21 Blackjack	Uqab	NCSIST
BPPT/ PTDI	Hellenic Aerospace Industry (AEB)	Chung Shyang 2
PUNA Wulung	Archytas	Navmar ASC
CASC	HESA	RQ-23 Tigershark
CH-3	Ababil-3 / Swallow 3	NORINCO
CH-3A	Atlas (Ababil-3 upgrade)	CR500 Golden Eagle
CH-92A	Shahed 123	NPP Mikran
Sky-02	Hindustan Aeronautics Limited (HAL)	Carnivora
CATIC	RUAV 200	NPT MBK
ASN-301 (JWS-01)	Hydra Technologies	Burevest-nik-MB
CAVIM	G1 Guerrero	OKB Luch
Mohajer-2	S4 Ehécatl	Korsar/Corsair
CIDFAE	S45 Balaam	PGZ SA WZL2 PIT-RADWAR
UAV-2 Gavilan/ Hawk	IAI	Orlik PGZ-19R
CIDEP	Harop (Harpy 2)	Primoco UAV
FAP Mk6 Amaru	Harpy	Primoco UAV One 150M
Colombian CIAC	Searcher	Qods
Quimbaya	IAR-Brasov	Mohajer-6
CSIR	Heron	Russian Helicopter Group
LEMU	INIDETAM	Katran
CTRM	SPARTAAM	RV Connex
Aludra	INTRA Defense Technologies	U-1 Sky Scout
Denel Dynamics	Asef	Schiebel
Seeker 400	Karayel-SU	Camcopter S-100
DGlyD		SCR



Atlantic	Caçador	Intracom Defense (IDE)
Skyways	Baykar Makina	LOTUS
Skyways V2.2	Bayraktar TB2	IRIAF
Thales	Bayraktar TB2S	Kaman-22
Watchkeeper	Bayraktar TB3	KAI
Threod systems	MUIS	Night Intruder 600 VT
Stream C	CASC	Kronstadt Group
UAVision	CH-4	Orion
Ogassa OGS 42	CH-5	Lockheed Martin
Ukrspesystems	CH-6	RQ-170 Sentinel
PD-1	CASIC	LUCH
PD-1 VTOL	WJ-600 A/D	Sokil-300
UMS Skeldar	Colombian CIAC	NajaF TU
Skeldar V-200	Atlante II / SIRTAP	Furat-3
UTVA Aviation Industry	DGlyD	NCSIST
Pegaz 011	Vigia 2B	Tengyun
Vestel Defence	DRDO	NESCOM
Karayel-SU	Rustom-2	Anka S
Viettel Corporation	DTI	Burraq
Magic Eye	D-Eyes 04	Northrop Grumman
Shikra	EADS Spain	MQ-8B Fire Scout
VT-Patrol	Atlante II / SIRTAP	MQ-8C Fire Scout
VT-Strike	Egyptian Ministry of Military	PDTI
VUA-SC-3G / VT-Pigeon	Production	Elang Hitam / Black Eagle
Weishi	EJune-30 SW	Piaggio Aerospace
WS-43	Elbit Systems	P.1HH Hammerhead
Xi'an Aisheng Technology Group	Hermes 900	PTDI / TAI
ASN-104	Embraer	Aksungur Based
ASN-209	FAB	Elang Hitam / Black Eagle
	General Atomics	Sagem
	MQ-1B Predator	Patroller
	MQ-1C Gray Eagle	Shahed Aviation Industries
	MQ-9A Reaper	Saegheh
	MQ-9B SeaGuardian	TAI
	MQ-9B SkyGuardian	Anka
	RQ-1B Predator XP	Anka S
	Harbin Aircraft Industry (Group)	Anka-2 Aksungur
	BZK-005	Tbilisi Aviation Entreprise
	HESA	T-31
	Karrar	VAST
	Shaheb 129	HS-6L
	Shaheb 149	Zhongtian Feilong IT
	IAI	Feilong 2
	Eitan (Heron TP)	
	Heron	
	Shoval	
	ICER	
	Thebes 30	
		HALE
Class III		
ADCOM Systems		
Yabhon Flash 20		
Yabhon United 40		
Aeronautics		
Dominator		
Airbus DS		
Euromale		
Airbus Helicopter		
SDAM/VSR700		
AVIC		
GJ-1 Wing Loong 1D		
GJ-1 Wing Loong I		
GJ-2 Wing Loong II		
Wing Loong 10		
WZ-8 / BZK-8 / DR-8		
Avionics services		

**Airbus DS**

Zephyr S

Boeing

Aurora Orion

CASIC

WJ-700

GAIG

WZ-7

Northrop Grumman

MQ-4C Triton

RQ-180 White bat

RQ-4 Global Hawk

RQ-4D Phoenix 5 AGS

UZGA

Altius-U

UCAV

AVIC

GJ-11

Baykar Makina

Bayraktar Akinci

Boeing

Loyal wingman

MQ-25 Stingray

CCKW

LJ-1

Dassault Consortium

Neuron

DRDO

Ghatak

General Atomics

MQ-20 Avenger (Predator C)

Hindustan Aeronautics Limited (HAL)

Warrior

Krato Defense & Security

Valkyrie

Lockheed Martin

RQ-170 Sentinel

Northrop Grumman

RQ-180

Spirit AeroSystems

Mosquito

Sukhoi

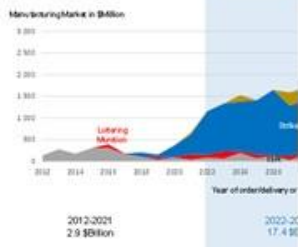
S-70 Okhotnik

TAI

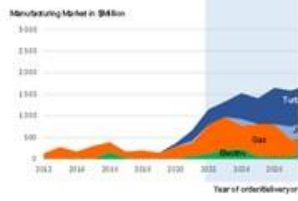
Goksungur



Russia & Central Asia Military UAS Manufacturing Application
2012-2021, forecasts to 2031



Russia & Central Asia Military UAS Manufacturing per Type of Power
2012-2021, forecasts to 2031



Worldwide Military UAS Manufacturing Market 2012-2021, forecast to 2031

4. Regional Markets

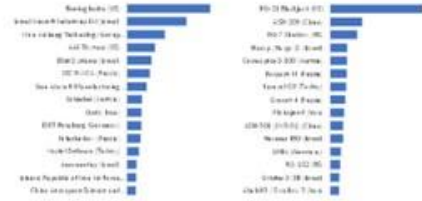
4.1 Asia



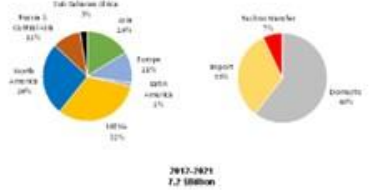
China and India drive the demand, mostly for class III syst Asia is the second largest regional market for military UA manufacturing turnover. Its consolidated value is estimate 2012-2021. The market reached a growing \$1.9 billion sin China and India were responsible for 55% and 17% resp market. South Korea and Pakistan are second tier countie regional demand while Philippines, Australia and Afghan each. The remaining 12 countries all together generated \$ with a recent commitment to UAS for a significant part of t Air Forces in Asia are the most important users of military market contracts. Armies and Navies/Marines are then each. Air forces in Asia tend to operate higher classes U experimented lower classes systems. The class III UAS market accounted for an impressive 62% in Asia over 2012-2021. The annual market for class III all an estimated \$1.2 billion of deliveries in 2021. HALE syst the region by China in 2018, South Korea in 2019, Japar The HALE market accounted for 12% of the past market, 1 well established in the region with a former high share of 8 Many systems are however being replaced by class III U only represents 16% of the past turnover and even less t UAS represented 7% of the past demand with significant i Asian countries used to mainly operate UAS for ISR mis grew fast all along the decade. It represents 45% of the t third of the recent procurements. Lobbing munitions acco being trained in China and Australia.

Worldwide Military UAS Manufacturing Market 2012-2021, forecast to 2031

Worldwide Top 15 Class II Military UAS Manufacturers & Models
2012-2021 estimated relative captured market



Consolidated Market per Region of Manufacturing and per Type of Market
2012-2021



Worldwide Military UAS Manufacturing Market 2012-2021, forecast to 2031

MENA identified future UAS procurements per country and per Class
(as of May 2022)

Country	Class I	Class II	Class III	HALE	UCAV
Algeria	-	-	CH4 DU-Lee		
Egypt	-	Nut (Egypt)	EJA (EG) The (EG) QJ-Loo		
Iran	Fajr-1 EW (Iran)	Albat (Abate-2 upgrade) (Iran) Karman-12 (Iran) Shaned 130 (Iran)	Sae Shz Gai (Iran) Shae 130 (Iran)		
Iraq	Furat-1 (Iraq)	Phoenix One 150M (Czech Republic)	Bay TBG (Iraq) MQ-9 (Iraq) Fur		
Israel	Smart Dragon (Israel)	Hemp (Israel)?	Har (Israel)		
Jordan	-	-	MQ (JD)		
Morocco	-	Hemp (Israel) domestic production in discussion	Bay (Tu) MQ (Israel) exp per		
Oman	-	-	Bay (Tu)		
Qatar	-	-	Bay (Tu)		

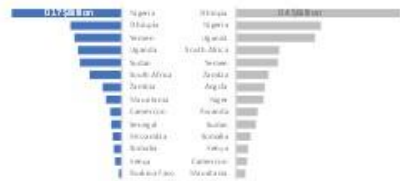
Worldwide Military UAS Manufacturing Market 2012-2021, forecast to 2031

Russia & Central Asia Top 10 Military UAS purchased per Class
2017-2021 (5 years), estimated relative turns

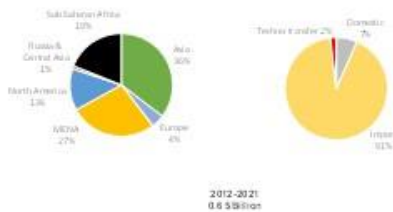


Worldwide Military UAS Manufacturing Market 2012-2021, forecast to 2031

Sub Saharan Africa Top Military UAS Consolidated National Markets
2012-2021 estimated, 2022-2031 forecasted



Consolidated Market per Region of Manufacturing and per Type of Market
2012-2021



2012-2021, 0.6 \$B/Year

