

Aerospace and Defense Battery Market - A Global and Regional Analysis: Focus on Platform, Battery Type, Sales, and Region - Analysis and Forecast, 2023-2033

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Abstracts

Introduction to Global Aerospace and Defense Battery Market

The global aerospace and defense battery market has experienced remarkable growth in recent years due to the increasing advancements in technology and the emergence of new applications of batteries in space, aircraft, UAVs, and the defense sector. This growth is primarily driven by the government's efforts to advance the electrification of these sectors, which has demonstrated its continuous expansion and robust growth. Additionally, the market is driven by the growing adoption of commercial UAVs by e-commerce players and other civil professionals such as videography, remote monitoring, etc. By leveraging UAV and battery-operated drones in military surveillance subsystems, authorities can enhance security, improve reliability, and optimize operational efficiency. Notable companies include Saft, ECOBAT, GS Yuasa International Ltd., Navitas System, Ultralife Corporation, and EaglePicher Technologies, among others. These companies heavily invest in research and development to introduce innovative and high-capacity batteries for aerospace and defense applications. The market is expected to witness continued growth as key players and government agencies invest in advanced technologies to enhance performance and effectiveness, leading to new opportunities for growth and innovation in the sector.

Market Introduction

The global aerospace and defense battery market is witnessing significant growth and is expected to gain a competitive share in recent years. This market focuses on the development, manufacturing, and supply of batteries and energy storage solutions that are designed to meet the unique and demanding requirements of aerospace and

defense applications. These batteries are used in a wide range of equipment and systems, including aircraft, spacecraft, UAVs, military vehicles, submarines, and various electronic devices used in defense and aerospace operations. Also, the continuous trend of the aerospace industry to gradually move toward electric and hybrid-electric propulsion systems is supporting the market adoption. This shift drove the demand for batteries with higher energy densities to extend the range and efficiency of electric aircraft.

Furthermore, there is a strong emphasis on developing battery systems that can withstand extreme conditions, such as high temperatures, rapid altitude changes, and mechanical stress, without compromising safety. Several regional governments are aiming to support local manufacturers and research institutes to innovate and develop advanced battery technology. This technology may help the authorities to create precise and sophisticated battery cell packs to address the temperature and altitude-related concerns in the aerospace sector. This will further support the aerospace and defense battery market to expand during the forecast period.

Industrial Impact

Increased investment from public and private industry has emerged as a significant driver of growth in the global aerospace and defense battery market. Batteries are vital for space exploration missions. These batteries power spacecraft, rovers, and other equipment used in space missions. Advances in battery technology have allowed for longer-lasting and more reliable power sources for these missions. Many countries have established national strategies and initiatives to promote space-based technology research and development. These programs aim to accelerate advancements in battery technologies, support innovation in battery chemicals, and foster collaborations between industrial players. Also, the aerospace and defense battery market has a substantial industrial impact by enabling advancements in technology, increasing the efficiency and capabilities of aerospace and defense systems, and contributing to the overall safety and reliability of critical applications in these sectors. Additionally, it plays a role in shaping the future of sustainable aviation and defense technologies through the development of high-performance, lightweight batteries.

Market Segmentation:

Segmentation 1: by Application (Platform)

Space

Satellite

Launch Vehicle

Deep Space

Aircraft

Military

Civil and Commercial

UAV

Military

Civil and Commercial

Defense

Ground Based

Marine Based

UAV Segment to Dominate Global Aerospace and Defense Battery Market (by Platform)

The global aerospace and defense battery market was led by the UAV platform application. It generated \$5.30 billion in 2022 and is projected to reach \$14.35 billion in 2033 at a CAGR of 9.69% during the forecast period 2023-2033. UAVs have become integral components of modern military operations, surveillance, and civilian applications. One of the most significant trends impacting this segment is the increasing demand for longer endurance and higher payload capacity. This necessitates the development of advanced battery technologies capable of delivering extended flight durations and supporting sophisticated payloads such as high-resolution cameras and sensors.

Furthermore, the push toward miniaturization and lightweight UAV designs is driving

innovation in battery materials and energy density. Lithium-ion and other advanced battery chemistries are being optimized to provide more power in smaller, lighter packages, allowing UAVs to achieve greater agility and operational flexibility. Moreover, safety and reliability concerns are spurring the development of battery management systems that enhance the overall performance and longevity of UAV batteries.

Segmentation 2: by Battery Type

Lithium-Based Battery

Lithium Polymer Battery

Lithium-Ion Battery

Nickel-Based Battery

Nickel-Cadmium (NiCd) Battery

Nickel-Metal Hydride Battery

Thermal Battery

Others

Lithium-Based Battery to be the Leading Segment in the Global Aerospace and Defense Battery Market (by Battery Type)

The global aerospace and defense battery market is expected to be dominated by the lithium-ion battery in the coming years. The market growth is attributed to the increasing focus of the aerospace and defense industry on electrification to reduce greenhouse gas emissions and improve operational efficiency. Electric and hybrid-electric aircraft are gaining traction, and these innovations necessitate advanced lithium-ion battery technologies capable of meeting the stringent safety and performance requirements of aviation regulators. As the technology continues to evolve, offering enhanced energy density, faster charging capabilities, and improved safety features, it is expected to maintain its dominant position in the aerospace and defense battery market.

Segmentation 3: by Sales

OEM

Aftermarket

Segmentation 4: by Region

North America - U.S. and Canada

Europe - U.K., France, Germany, and Rest-of-Europe

Asia-Pacific - China, India, Japan, Australia, and Rest-of-Asia-Pacific

Rest-of-the-World - Latin America and Middle East and Africa

North America to Dominate Global Aerospace and Defense Battery Market (by Region)

North America is anticipated to grow at a CAGR of 8.69%. The presence of a larger number of established defense and aerospace players, as well as high-capacity battery manufacturers, is driving the market in the region. The regional market is influenced by a convergence of factors, including defense investments, electrification efforts, sustainability concerns, and collaborative research initiatives. These trends are expected to continue shaping the market landscape, making it a region of significant importance and opportunity for industry players and investors.

Additionally, the growing collaborations and partnerships between battery manufacturers, aerospace companies, and research institutions in North America are fostering innovation. These collaborations aim to develop cutting-edge battery technologies, including solid-state batteries and improved energy storage solutions, which are expected to have a profound impact on the market growth in the coming years.

Recent Developments in Global Aerospace and Defense Battery Market

In April 2023, Shift Clean Energy announced the delivery of Singapore's hybrid bunker tanker vessel designed by SeaTech Solutions. This vessel is integrated with Shift's 480 kWh Energy Storage System (ESS). This system optimizes energy utilization, greatly reduces fuel and maintenance costs, improves

responsiveness and dependability of power management, and hence improves operational safety. Shift presently provides battery-based ESS technology to the marine industry, as well as its PwrSw?p pay-as-you-go power service to on-land customers, including ports, terminals, offshore wind farms, and others.

In March 2023, Saft, a subsidiary of TotalEnergies, supplied space-qualified lithium-ion batteries for six satellites developed by Thales for EUMETSAT. The company focuses on enabling more accurate weather forecasting by integrating these batteries in the Meteosat Third Generation (MTG) satellite program. Also, the batteries would support payloads on two types of satellites over a 20-year mission, corresponding to the lifespan of the different satellites. Four imaging satellites would gather visual data on the formation of weather systems and lightning strikes, whereas two sounding satellites would track water vapor and trace gases in the atmosphere.

In November 2022, GS Yuasa Corporation started working with Osaka Metropolitan University on a joint research project for the development of all-solid-state batteries. The company is using its high-performance solid electrolytes to develop an all-solid-state battery that surpasses the performance of conventional storage batteries. This will continue to contribute to the goal of achieving carbon neutrality through the development of next-generation battery technologies.

In March 2022, ACP Technologies LLC signed a partnership agreement with Navitas System, a U.S.-based energy storage solutions provider for military applications and a DoD contractor. Under this agreement, ACPT was expected to deliver graphite anode materials to Navitas for use in the DoD battery project. This project focuses on eliminating the dependency on foreign lithium battery sources for defense resilience by producing synthetic graphite-based in-house production.

In January 2022, Navitas System awarded a contract to Ascend Elements, a vertically integrated lithium-ion battery recycling and engineered materials company. Under this contract, Ascend delivered cathode active material made from recycled batteries and scrap to Navitas Systems for the DoD battery project. Such collaborations among local suppliers and OEMs focus on boosting U.S. independence on national security and energy materials imported from other countries.

Demand – Drivers and Limitations

Market Driver: Increasing Electrification of Aircrafts

The aerospace and defense battery market is expected to gain traction across the globe due to the increasing electrification of aircraft. This is a significant trend in the aviation industry, driven by the pursuit of greater efficiency, reduced emissions, and advancements in electric propulsion technology. Aircraft electrification involves the integration of electric propulsion systems alongside traditional gas turbine engines. This can range from mild hybrid systems to fully electric propulsion. Electric systems can power either the entire aircraft or specific components such as auxiliary systems, taxiing, or propulsion during specific flight phases. These systems require advanced and high-capacity batteries to store and deliver the required electrical energy for propulsion. The aviation sector demands batteries with high energy density to ensure that aircraft can achieve adequate range and endurance. Moreover, the growing research and development efforts focused on improving battery energy density to meet the demanding requirements of aviation applications will propel the market growth in the coming years.

Market Challenge: Design Challenges Associated with the Size of Aircraft

Problems associated with the design decision for batteries reliable for aircraft fitments act as restraining factors for the aerospace and defense battery market. Designing batteries for aircraft, especially smaller and more compact aircraft such as drones and electric air taxis, comes with several unique challenges related to size, weight, and performance. The size of an aircraft is a major factor that affects the design of its batteries. Addressing these battery design challenges requires a multidisciplinary approach involving expertise in materials science, electrical engineering, thermal management, and aviation regulations. As technology advances, battery designers continue to innovate to meet the specific needs of smaller aircraft while overcoming these challenges to enable safe, efficient, and sustainable aviation solutions.

Market Opportunity: Emergence of Urban Air Mobility and eVTOL Vehicles

The emergence of urban air mobility (UAM) and electric vertical take-off and landing (eVTOL) vehicles in aerospace and defense represents a significant shift in the way people and cargo are transported and how military operations are conducted. UAM is an emerging concept in the aerospace and defense industry that envisions the use of eVTOL aircraft to provide on-demand air transportation within urban and metropolitan

areas. As urbanization continues to grow, military forces may find themselves operating more frequently in densely populated urban areas. UAM technologies can offer new ways to transport troops, equipment, and supplies within urban environments while avoiding ground congestion and threats. Defense agencies often collaborate with commercial aerospace companies on research and development projects.

How can this report add value to an organization?

Product/Innovation Strategy: The product segment helps the reader understand the different types of batteries available for deployment and their potential globally. Moreover, the study provides the reader with a detailed understanding of the global aerospace and defense battery market.

Growth/Marketing Strategy: The global aerospace and defense battery market has seen major developments by key players operating in the market, such as contracts, collaborations, and joint ventures. The favored strategy for the companies has been contracted to strengthen their position in the global aerospace and battery market. For instance, in November 2022, GS Yuasa International Ltd. started working with Osaka Metropolitan University on a joint research project for the development of all-solid-state batteries. The company is using its high-performance solid electrolytes to develop an all-solid-state battery that surpasses the performance of conventional storage batteries. This would continue to contribute to the goal of achieving carbon neutrality through the development of next-generation battery technologies.

Competitive Strategy: Key players in the global aerospace and defense battery market analyzed and profiled in the study involve major global companies providing lithium-based, nickel-based, and thermal batteries, respectively. Moreover, a detailed market share analysis of the players operating in the global aerospace and defense battery market has been done to help the reader understand how players stack against each other, presenting a clear market landscape. Additionally, comprehensive competitive strategies such as partnerships, agreements, and collaborations will aid the reader in understanding the untapped revenue pockets in the market.

Methodology: The research methodology design adopted for this specific study includes a mix of data collected from primary and secondary data sources. Both primary resources (key players, market leaders, and in-house experts) and secondary research (a host of paid and unpaid databases), along with analytical tools, are employed to build the predictive and forecast models.

Data and validation have been taken into consideration from both primary sources as well as secondary sources.

Primary Research

The primary sources involve industry experts from the aerospace and defense industry, including space equipment, aircraft, UAV, and defense vehicle providers. Respondents such as CEOs, vice presidents, marketing directors, and technology and innovation directors have been interviewed to obtain and verify both qualitative and quantitative aspects of this research study.

Secondary Research

This study involves the usage of extensive secondary research, company websites, directories, and annual reports. It also makes use of databases, such as the U.K. Space Agency, Global Battery Alliance, The Drone Databook, World Economic Forum, and World Bank, and others, to collect effective and useful information for a market-oriented, technical, commercial, and extensive study of the global market. In addition to the data sources, the study has been undertaken with the help of other data sources and websites, such as www.darpa.mil.

Secondary research was done to obtain critical information about the industry's value chain, the market's monetary chain, revenue models, the total pool of key players, and the current and potential use cases and applications.

Key Market Players and Competition Synopsis

The companies that are profiled have been selected based on thorough secondary research that includes analyzing company coverage, product portfolio, market penetration, and insights, which are gathered from primary experts.

The top established aviation and defense-grade battery providers hold around 68% of the presence in the market. The start-ups in the market hold around 32% of the global aerospace and defense battery market.

Key Companies Profiled:

Bren-Tronics, Inc.

Concorde

ECOBAT

GS Yuasa International Ltd.

Lincad

Navitas System

Saft

Sion Power Corporation

WAE Technologies Limited

Shift

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