

UAV Propulsion System Market - A Global and Regional Analysis: Focus on UAV Type, End User, Engine Horsepower, Engine Type, and Region - Analysis and Forecast, 2023-2033

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Abstracts

Global UAV Propulsion System Market Overview

The global UAV propulsion system market is estimated to reach \$10.76 billion in 2033 from \$8.36 billion in 2022, at a CAGR of 2.33% during the forecast period 2023-2033 in terms of value. The global UAV propulsion system market is expected to be driven by defense and government applications due to the high capital investment involved in the development of the propulsion system. However, commercial applications are expected to witness a high growth rate during the forecast period due to an increase in the usage of UAVs in commercial applications leading to investment in technologically advanced propulsion systems.

Market Lifecycle Stage

Unmanned aerial vehicles (UAVs) have been the subject of extensive research and development worldwide since they first appeared in the early 19th century. The majority of the UAV market was initially dominated by the military, who primarily used them. UAVs now incorporate numerous modules, such as sensors, cameras, and light detection and ranging (LiDAR), making them more useful in the civil and commercial fields as a result of advancements in science and technology. Such developments have encouraged players operating in the market to focus on the development of UAV propulsion systems with a simultaneous push for improving UAV production. The benefits of UAVs using conventional fuel propulsion systems include a large payload, long endurance, a wide range, and quick resupply. However, with the escalating

environmental issues and the diminishing supply of fossil fuels, the energy issue for aircraft has emerged as a persistent difficulty. As a result, hybrid and all-electric UAVs and solar-powered UAVs have been witnessing research and development activities supported by investments for UAV manufacturers, making it one of the lucrative opportunities for players operating in the market. Despite such active developments, factors such as government regulations and high manufacturing costs restrain the market growth.

However, the growth of the global UAV propulsion systems market has also been augmented by widening commercial applications and private companies' interest in strengthening their UAV services portfolio by adopting the most advanced and efficient propulsion systems to strengthen their customer base. Additionally, research institutions are other major end users that are utilizing the propulsion systems, as government agencies are actively involved in the design, development, and testing of the latest UAVs and associated propulsion systems.

Owing to such benefits, companies are continuously striving to innovate their products and are into testing and development of these engines in partnership with UAV manufacturers and UAV service providers.

Impact

The global UAV propulsion system market is observing rising demand across various end users, which drives the development of investments across the various UAV propulsion systems. The extended range and reliability of UAVs are two major factors that are expected to influence the design and associated demand for the engine by the consumer. The UAV propulsion systems market also has the potential to develop more opportunities and generate immense revenue via various kinds of technological capabilities such as fuel cell technology, micro turbine propulsion, solar propulsion, electric propulsion, etc. Most companies operating in the UAV propulsion system market are well-established and experienced players. Though numerous drone start-up companies have evolved over recent years, the establishment ratio of UAV propulsion system manufacturing companies is comparatively low.

Some of the notable reasons for this current scenario is high investment cost and various government regulations. In general, the cost of certification and development of a new engine currently exceeds one billion dollars. It, therefore, seems simpler and less expensive for drone companies to buy existing engines already certified, where they will only pay part of the non-recurring costs. Hence, in addition to cost and regulations, the

long-term supply agreements between the UAV manufacturers and the UAV propulsion system manufacturers have impacted the emergence rate of the UAV propulsion system start-ups and investment Landscape. Despite such challenges, some of the start-ups and the curve of investments to develop their company's presence are picking up pace and are slowly expected to gain traction over the forecast period. Furthermore, in the upcoming years, more companies will enter the UAV propulsion systems, and with the rising penetration of UAV start-ups, the demand for suitable propulsion systems is expected to grow over the forecast period.

Market Segmentation:

Segmentation 1: by UAV Type

- Small UAVs

 - Mini UAVs

 - Micro UAVs

- Tactical UAVs

- Medium-Altitude Long-Endurance (MALE)

- High-Altitude Long-Endurance (HALE)

- Vertical Take-off and Landing (VTOL)

Segmentation 2: by End User

- Commercial

- Military

- Civil government

Segmentation 3: by Engine Horsepower

10-50 HP

51-100 HP

101-150 HP

151-200 HP

Above 200 HP

Segmentation 4: by Engine Type

Piston Engine

Turbine Engine

Turbofan Engine

Electrically Powered Engine

Wankel Engine

Solar-Powered Engine

Segmentation 5: by Region

North America - U.S. and Canada

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

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

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

The North America region dominates the global UAV propulsion system market, with huge investments and revenue expected to be generated from the U.S. and Canada

markets.

Recent Developments in Global UAV Propulsion System Market

In November 2022, PBS INDIA announced its plans to launch the PBS TJ200 turbojet engine in 2023. The company stated that this turbojet engine PBS TJ200 is currently in the last stage of development and is designed primarily as a propulsion unit for modern UAV and UCAV systems. It is a compact engine of a simple design, fuel lubricated, equipped with a BLDC starter-generator, electric metering fuel pump, and electronic control system of FADEC type.

In October 2022, BRP-Rotax GmbH & Co KG stated that it had suspended the delivery of aircraft engines to “countries with unclear usage” in the wake of reports that some of those engines are being used on Turkish combat drones deployed by Azerbaijan in fighting against Armenian forces in Nagorno-Karabakh. It has further been stated that Rotax aircraft engines are produced, designed, and certified for civil use only by the applicable civil regulatory authority.

In July 2022, General Atomics Aeronautical Systems, Inc. (GA-ASI) tested a PT6 E-Series model turboprop engine from Pratt & Whitney Canada on GA-ASI's MQ-9B Remotely Piloted Aircraft (RPA). Multiple full-power engine tests were performed at GA-ASI's Desert Horizon flight operations facility in El Mirage, California, on July 29, 2022. The company stated that the PT6 E-Series is a reliable and versatile turboprop engine family focused on delivering the performance characteristics required as GA-ASI continues its development of MQ-9B capabilities.

In April 2022, Suter Industries announced that their Suter TOA288 24hp UAV engine was selected by Volansi to provide propulsion for their VOLY M20 and VOLY 50 Series Vertical Take-off and Landing (VTOL) drones. Volansi is a leader in aerial drone logistics services for customers in the defense, commercial, and humanitarian markets. Volansi VTOL aircraft are designed for long endurance, heavy payloads, and to perform in challenging environments, providing surveillance as well as essential parts and supplies to the field.

Demand - Drivers and Limitations

The following are the drivers for the global UAV propulsion system market:

Rising Procurement of Unmanned Aerial Vehicles by Defense Forces

Growing Focus of Manufacturers on Lightweight and Fuel-Efficient Drone Engines

The following are the challenges for the global UAV propulsion system market:

Notable Incidents of Engine Failure and Improper Functioning

High Investment Costs and Supply Chain Complexities

Following are the opportunities for the global UAV propulsion system market:

Focus of Manufacturers on Developing Sustainable Propulsion Systems for UAVs

Ongoing Developments of Electric VTOL Aircraft

How can this report add value to an organization?

Product/Innovation Strategy: The service segment helps the reader understand the different end users that will generate the demand for UAV propulsion systems globally. Moreover, the study provides the reader with a detailed understanding of the different UAV propulsion systems based on UAV type (small UAVs, tactical UAVs, MALE, HALE, and VTOL), end user (commercial, military, and civil government), engine horsepower (10-50 HP, 51-100 HP, 101-150 HP, 151-200 HP, and Above 200 HP), and engine type (piston engine, turbine engine, turbofan, Wankel engine, electrically powered engine, and solar-powered engine).

Growth/Marketing Strategy: The global UAV propulsion system market has seen major development by key players operating in the market, such as business expansion activities, contracts, product launches, mergers, partnerships, collaborations, and joint ventures. The favored strategy for the companies has been contracted to strengthen their position in the global UAV propulsion systems market. For instance, in April 2022,

the performance partner of 3W International GmbH announced that it had unveiled two new Wankel engines for UAS (unmanned aerial systems) at the 2022 AUVSI Xponential trade show in Orlando, Florida. The SP-360 DRE is a double-blade Wankel engine with up to 51 HP (38 kW) at 6000 RPM, and the SP-540 TRE is a triple-blade Wankel engine that delivers 74 HP (55 kW) at 6000 RPM. The entire Sky Power engine portfolio can be used for hybrid applications, and the company's SP-55 FI TS generator has been developed for this purpose. It is the first two-stroke engine from the company that has been developed purely for the generation of electrical energy. For UAVs, the benefit of such a solution is extended range, flight time, and carrying capacity.

Competitive Strategy: Key players in the global UAV propulsion systems market analyzed and profiled in the study involve UAV propulsion system manufacturers. Moreover, a detailed competitive benchmarking of the players operating in the global UAV propulsion system 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 contracts, partnerships, agreements, acquisitions, and collaborations will aid the reader in understanding the untapped revenue pockets in the market.

Key Market Players and Competition Synopsis

The companies profiled have been selected based on inputs gathered from primary experts and analysis of the company's coverage, product portfolio, and market penetration. The established and improved defense spending on modernization and upgradation of the fleet with the latest technology across major countries like the U.S., U.K., Germany, France, India, China, Japan, and others are expected to create opportunities for UAV propulsion system manufacturers. In addition, as these governments have also started taking necessary initiatives to promote the localization of UAVs and their associated components like propulsion systems, the players operating in the global UAV propulsion system market are expected to find lucrative opportunities over the forecast period.

The top segment players leading the market include established players constituting 65% of the total market share as of 2022, indicating a strong presence in the market. Other players included start-up entities that accounted for approximately 35% in the year 2022 in the total global UAV propulsion system market.

Key Companies Profiled

3W International GmbH

BRP-Rotax GmbH & Co KG

Diamond Aircraft Industries (Austro Engine)

Gemini Diesel (Superior Aviation Group)

HIRTH ENGINES GMBH

Rotron Power Ltd.

Suter Industries AG

UAV Engines Ltd.

Advanced Innovative Engineering Ltd.

Pratt & Whitney Inc. (Part of Raytheon Technologies)

Avio Aero (GE Aviation)

Rolls-Royce Holdings PLC

PBS India (Part of PBS Aerospace)

UAV Turbines Inc. (Subsidiary of Locust USA Inc.)

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