

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, turboprop, 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.)

Contents

1 MARKETS

1.1 Industry Outlook

- 1.1.1 Global UAV Propulsion System Market: Overview
- 1.1.2 Migration of UAV Operations from Electric to IC Engine Solutions
- 1.1.3 Emerging Technology Trends Related to IC Engines for UAV
- 1.1.4 Key UAV Use-Cases Compatible with IC Engine Solutions
- 1.1.5 Comparative Assessment of Key IC Engines Deployed in UAV
- 1.1.6 Ongoing and Upcoming programs for UAV Propulsion Systems
- 1.1.7 Key Supplier for UAV Propulsion System
- 1.1.8 Start-Ups and Investment Landscape
- 1.1.9 Supply Chain Analysis

1.2 Business Dynamics

- 1.2.1 Business Drivers
 - 1.2.1.1 Rising Procurement of Unmanned Aerial Vehicles by Defense Forces
 - 1.2.1.2 Growing Focus of Manufacturers on Lightweight and Fuel-Efficient Drone

Engines

- 1.2.2 Business Challenges
 - 1.2.2.1 Notable Incidents of Engine Failure and Improper Functioning
 - 1.2.2.2 High Investment Costs and Supply Chain Complexities
- 1.2.3 Business Strategies
 - 1.2.3.1 New Product Launch
- 1.2.4 Corporate Strategies
 - 1.2.4.1 Partnerships, Collaborations, Agreements, Contracts, and Others
- 1.2.5 Business Opportunities
 - 1.2.5.1 Focus of Manufacturers on Developing Sustainable Propulsion Systems for UAVs
 - 1.2.5.2 Ongoing Developments of Electric VTOL Aircraft

2 APPLICATION

2.1 Global UAV Propulsion System Market (by UAV Type)

- 2.1.1 Market Overview
 - 2.1.1.1 Demand Analysis for Global UAV Propulsion System Market (by UAV Type), Volume and Value Data
- 2.1.2 Small UAVs
 - 2.1.2.1 Mini UAVs

- 2.1.2.2 Micro UAVs
- 2.1.3 Tactical UAVs
- 2.1.4 Medium-Altitude Long-Endurance (MALE)
- 2.1.5 High-Altitude Long-Endurance (HALE)
- 2.1.6 Vertical Take-off and Landing (VTOL) Aircraft
- 2.2 Global Propulsion System Market (by End User)
 - 2.2.1 Market Overview
 - 2.2.1.1 Demand Analysis of the UAV Propulsion System Market (by End User), Volume and Value
 - 2.2.2 Commercial
 - 2.2.2.1 Precision Agriculture
 - 2.2.2.2 Inspection and Monitoring
 - 2.2.2.3 Surveying and Mapping
 - 2.2.2.4 Product Delivery
 - 2.2.2.5 Others
 - 2.2.3 Military
 - 2.2.3.1 Combat Operations
 - 2.2.3.2 Search and Rescue
 - 2.2.3.3 Intelligence, Surveillance, and Reconnaissance (ISR)
 - 2.2.4 Civil Government
 - 2.2.4.1 Transportation
 - 2.2.4.2 Border Patrol
 - 2.2.4.3 Conservation and Environment Monitoring
 - 2.2.4.4 Firefighting
 - 2.2.4.5 Others

3 PRODUCTS

- 3.1 Global UAV Propulsion System Market (by Engine Horsepower)
 - 3.1.1 Market Overview
 - 3.1.1.1 Demand Analysis of Global UAV Propulsion System Market (by Engine Horsepower), Volume and Value
 - 3.1.2 10-50 HP
 - 3.1.3 51-100 HP
 - 3.1.4 101-150 HP
 - 3.1.5 151-200 HP
 - 3.1.6 Above 200 HP
- 3.2 Global UAV Propulsion System Market (by Engine Type)
 - 3.2.1 Market Overview

3.2.1.1 Demand Analysis of Global UAV Propulsion System Market (by Engine Type),
Volume and Value

3.2.2 Piston Engine

3.2.3 Turbine Engine

3.2.4 Turbofan Engine

3.2.5 Electrically Powered Engine

3.2.6 Wankel Engine

3.2.7 Solar-Powered Engine

4 REGION

4.1 Global UAV Propulsion System Market (by Region)

4.2 North America

4.2.1 Market

4.2.1.1 Key Players in North America

4.2.1.2 Business Drivers

4.2.1.3 Business Challenges

4.2.2 Application

4.2.2.1 North America UAV Propulsion System Market (by UAV Type), Volume and
Value

4.2.2.2 North America UAV Propulsion System Market (by End User), Volume and
Value

4.2.3 Product

4.2.3.1 North America UAV Propulsion System Market (by Engine Horsepower),
Volume and Value

4.2.3.2 North America UAV Propulsion System Market (by Engine Type), Volume and
Value

4.2.4 North America (by Country)

4.2.4.1 U.S.

4.2.4.1.1 Markets

4.2.4.1.1.1 Key Players in the U.S.

4.2.4.1.2 Application

4.2.4.1.2.1 U.S. UAV Propulsion System Market (by UAV Type), Volume and
Value

4.2.4.1.2.2 U.S. UAV Propulsion System Market (by End User), Volume and Value

4.2.4.1.3 Product

4.2.4.1.3.1 U.S. UAV Propulsion System Market (by Engine Horsepower), Volume
and Value

4.2.4.1.3.2 U.S. UAV Propulsion System Market (by Engine Type), Volume and

Value

4.2.4.2 Canada

4.2.4.2.1 Markets

4.2.4.2.1.1 Key Players in Canada

4.2.4.2.2 Application

4.2.4.2.2.1 Canada UAV Propulsion System Market (by UAV Type), Volume and

Value

4.2.4.2.2.2 Canada UAV Propulsion System Market (by End User), Volume and

Value

4.2.4.2.3 Product

4.2.4.2.3.1 Canada UAV Propulsion System Market (by Engine Horsepower),

Volume and Value

4.2.4.2.3.2 Canada UAV Propulsion System Market (by Engine Type), Volume and

Value

4.3 Europe

4.3.1 Market

4.3.1.1 Key Players in Europe

4.3.1.2 Business Drivers

4.3.1.3 Business Challenges

4.3.2 Application

4.3.2.1 Europe UAV Propulsion System Market (by UAV Type), Volume and Value

4.3.2.2 Europe UAV Propulsion System Market (by End User), Volume and Value

4.3.3 Product

4.3.3.1 Europe UAV Propulsion System Market (by Engine Horsepower), Volume and

Value

4.3.3.2 Europe UAV Propulsion System Market (by Engine Type), Volume and Value

4.3.4 Europe (by Country)

4.3.4.1 France

4.3.4.1.1 Markets

4.3.4.1.1.1 Key Players in France

4.3.4.1.2 Application

4.3.4.1.2.1 France UAV Propulsion System Market (by UAV Type), Volume and

Value

4.3.4.1.2.2 France UAV Propulsion System Market (by End User), Volume and

Value

4.3.4.1.3 Product

4.3.4.1.3.1 France UAV Propulsion System Market (by Engine Horsepower),

Volume and Value

4.3.4.1.3.2 France UAV Propulsion System Market (by Engine Type), Volume and

Value

4.3.4.2 Germany

4.3.4.2.1 Markets

4.3.4.2.1.1 Key Players in Germany

4.3.4.2.2 Application

4.3.4.2.2.1 Germany UAV Propulsion System Market (by UAV Type), Volume and

Value

4.3.4.2.2.2 Germany UAV Propulsion System Market (by End User), Volume and

Value

4.3.4.2.3 Product

4.3.4.2.3.1 Germany UAV Propulsion System Market (by Engine Horsepower),

Volume and Value

4.3.4.2.3.2 Germany UAV Propulsion System Market (by Engine Type), Volume

and Value

4.3.4.3 U.K.

4.3.4.3.1 Markets

4.3.4.3.1.1 Key Players in the U.K.

4.3.4.3.2 Application

4.3.4.3.2.1 U.K. UAV Propulsion System Market (by UAV Type), Volume and

Value

4.3.4.3.2.2 U.K. UAV Propulsion System Market (by End User), Volume and Value

4.3.4.3.3 Product

4.3.4.3.3.1 U.K. UAV Propulsion System Market (by Engine Horsepower), Volume

and Value

4.3.4.3.3.2 U.K. UAV Propulsion System Market (by Engine Type), Volume and

Value

4.3.4.4 Rest-of-Europe

4.3.4.4.1 Markets

4.3.4.4.1.1 Key Players in Rest-of-Europe

4.3.4.4.2 Application

4.3.4.4.2.1 Rest-of-Europe UAV Propulsion System Market (by UAV Type),

Volume and Value

4.3.4.4.2.2 Rest-of-Europe UAV Propulsion System Market (by End User), Volume

and Value

4.3.4.4.3 Product

4.3.4.4.3.1 Rest-of-Europe UAV Propulsion System Market (by Engine

Horsepower), Volume and Value

4.3.4.4.3.2 Rest-of-Europe UAV Propulsion System Market (by Engine Type),

Volume and Value

4.4 Asia-Pacific

4.4.1 Markets

4.4.1.1 Key Players in Asia-Pacific

4.4.1.2 Business Drivers

4.4.1.3 Business Challenges

4.4.2 Application

4.4.2.1 Asia-Pacific UAV Propulsion System Market (by UAV Type), Volume and Value

4.4.2.2 Asia-Pacific UAV Propulsion System Market (by End User), Volume and Value

4.4.3 Product

4.4.3.1 Asia-Pacific UAV Propulsion System Market (by Engine Horsepower), Volume and Value

4.4.3.2 Asia-Pacific UAV Propulsion System Market (by Engine Type), Volume and Value

4.4.4 Asia-Pacific (by Country)

4.4.4.1 China

4.4.4.1.1 Markets

4.4.4.1.1.1 Key Players in China

4.4.4.1.2 Application

4.4.4.1.2.1 China UAV Propulsion System Market (by UAV Type), Volume and Value

4.4.4.1.2.2 China UAV Propulsion System Market (by End User), Volume and Value

4.4.4.1.3 Product

4.4.4.1.3.1 China UAV Propulsion System Market (by Engine Horsepower), Volume and Value

4.4.4.1.3.2 China UAV Propulsion System Market (by Engine Type), Volume and Value

4.4.4.2 India

4.4.4.2.1 Markets

4.4.4.2.1.1 Key Players in India

4.4.4.2.2 Application

4.4.4.2.2.1 India UAV Propulsion System Market (by UAV Type), Volume and Value

4.4.4.2.2.2 India UAV Propulsion System Market (by End User), Volume and Value

4.4.4.2.3 Product

4.4.4.2.3.1 India UAV Propulsion System Market (by Engine Horsepower), Volume and Value

4.4.4.2.3.2 India UAV Propulsion System Market (by Engine Type), Volume and Value

4.4.4.3 Japan

4.4.4.3.1 Markets

4.4.4.3.1.1 Key Players in Japan

4.4.4.3.2 Application

4.4.4.3.2.1 Japan UAV Propulsion System Market (by UAV Type), Volume and Value

4.4.4.3.2.2 Japan UAV Propulsion System Market (by End User), Volume and Value

4.4.4.3.3 Product

4.4.4.3.3.1 Japan UAV Propulsion System Market (by Engine Horsepower), Volume and Value

4.4.4.3.3.2 Japan UAV Propulsion System Market (by Engine Type), Volume and Value

4.4.4.4 Rest-of-Asia-Pacific

4.4.4.4.1 Markets

4.4.4.4.1.1 Key Players in Rest-of-Asia-Pacific

4.4.4.4.2 Application

4.4.4.4.2.1 Rest-of-Asia-Pacific UAV Propulsion System Market (by UAV Type), Volume and Value

4.4.4.4.2.2 Rest-of-Asia-Pacific UAV Propulsion System Market (by End User), Volume and Value

4.4.4.4.3 Product

4.4.4.4.3.1 Rest-of-Asia-Pacific UAV Propulsion System Market (by Engine Horsepower), Volume and Value

4.4.4.4.3.2 Rest-of-Asia-Pacific UAV Propulsion System Market (by Engine Type), Volume and Value

4.5 Rest-of-the-World

4.5.1 Markets

4.5.1.1 Key Players in Rest-of-the-World

4.5.1.2 Business Drivers

4.5.1.3 Business Challenges

4.5.2 Application

4.5.2.1 Rest-of-the-World UAV Propulsion System Market (by UAV Type), Volume and Value

4.5.2.2 Rest-of-the-World UAV Propulsion System Market (by End User), Volume and Value

4.5.3 Product

4.5.3.1 Rest-of-the-World UAV Propulsion System Market (by Engine Horsepower), Volume and Value

4.5.3.2 Rest-of-the-World UAV Propulsion System Market (by Engine Type), Volume and Value

4.5.3.3 Middle East and Africa

4.5.3.3.1 Markets

4.5.3.3.1.1 Key Players in the Middle East and Africa

4.5.3.3.2 Application

4.5.3.3.2.1 Middle East and Africa UAV Propulsion System Market (by UAV Type), Volume and Value

4.5.3.3.2.2 Middle East and Africa UAV Propulsion System Market (by End User), Volume and Value

4.5.3.3.3 Product

4.5.3.3.3.1 Middle East and Africa UAV Propulsion System Market (by Engine Horsepower), Volume and Value

4.5.3.3.3.2 Middle East and Africa UAV Propulsion System Market (by Engine Type), Volume and Value

4.5.3.4 Latin America

4.5.3.4.1 Markets

4.5.3.4.1.1 Key Players in Latin America

4.5.3.4.2 Application

4.5.3.4.2.1 Latin America UAV Propulsion System Market (by UAV Type), Volume and Value

4.5.3.4.2.2 Latin America UAV Propulsion System Market (by End User), Volume and Value

4.5.3.4.3 Product

4.5.3.4.3.1 Latin America UAV Propulsion System Market (by Engine Horsepower), Volume and Value

4.5.3.4.3.2 Latin America UAV Propulsion System Market (by Engine Type), Volume and Value

5 MARKETS - COMPETITIVE BENCHMARKING & COMPANY PROFILES

5.1 Market Share Analysis

5.2 3W International GmbH

5.2.1 Company Overview

5.2.1.1 Role of 3W International GmbH in the Global UAV Propulsion System Market

5.2.1.2 Product Portfolio

5.2.2 Business Strategies

- 5.2.2.1 New Product Developments
- 5.2.3 Corporate Strategies
 - 5.2.3.1 Partnerships, Collaborations, Agreements, and Contracts
- 5.2.4 Analyst View
- 5.3 BRP-Rotax GmbH & Co KG
 - 5.3.1 Company Overview
 - 5.3.1.1 Role of BRP-Rotax GmbH & Co KG in the Global UAV Propulsion System Market
 - 5.3.1.2 Product Portfolio
 - 5.3.2 Business Strategies
 - 5.3.2.1 New Product Developments
 - 5.3.3 Corporate Strategies
 - 5.3.3.1 Partnerships, Collaborations, Agreements, and Contracts
 - 5.3.4 Analyst View
- 5.4 Diamond Aircraft Industries (Austro Engine)
 - 5.4.1 Company Overview
 - 5.4.1.1 Role of Diamond Aircraft Industries (Austro Engine) in the Global UAV Propulsion System Market
 - 5.4.1.2 Product Portfolio
 - 5.4.2 Corporate Strategies
 - 5.4.2.1 Partnerships, Collaborations, Agreements, and Contracts
 - 5.4.3 Analyst View
- 5.5 Gemini Diesel (Superior Aviation Group)
 - 5.5.1 Company Overview
 - 5.5.1.1 Role of Gemini Diesel (Superior Aviation Group) in the Global UAV Propulsion System Market
 - 5.5.1.2 Product Portfolio
 - 5.5.2 Corporate Strategies
 - 5.5.2.1 Partnerships, Collaborations, Agreements, Contracts, Mergers and Acquisitions
 - 5.5.3 Analyst View
- 5.6 HIRTH ENGINES GMBH
 - 5.6.1 Company Overview
 - 5.6.1.1 Role of HIRTH ENGINES GMBH in the Global UAV Propulsion System Market
 - 5.6.1.2 Product Portfolio
 - 5.6.2 Business Strategies
 - 5.6.2.1 New Product Developments
 - 5.6.3 Corporate Strategies

- 5.6.3.1 Partnerships, Collaborations, Agreements, and Contracts
- 5.6.4 Analyst View
- 5.7 Rotron Power Ltd.
 - 5.7.1 Company Overview
 - 5.7.1.1 Role of Rotron Power Ltd. in the Global UAV Propulsion System Market
 - 5.7.1.2 Product Portfolio
 - 5.7.2 Corporate Strategies
 - 5.7.2.1 Partnerships, Collaborations, Agreements, and Contracts
 - 5.7.3 Analyst View
- 5.8 Suter Industries AG
 - 5.8.1 Company Overview
 - 5.8.1.1 Role of Suter Industries AG in the Global UAV Propulsion System Market
 - 5.8.1.2 Product Portfolio
 - 5.8.2 Corporate Strategies
 - 5.8.2.1 Partnerships, Collaborations, Agreements, and Contracts
 - 5.8.3 Analyst View
- 5.9 UAV Engines Ltd.
 - 5.9.1 Company Overview
 - 5.9.1.1 Role of UAV Engines Ltd. in the Global UAV Propulsion System Market
 - 5.9.1.2 Product Portfolio
 - 5.9.2 Analyst View
- 5.1 Advanced Innovative Engineering Ltd.
 - 5.10.1 Company Overview
 - 5.10.1.1 Role of Advanced Innovative Engineering Ltd. in the Global UAV Propulsion System Market
 - 5.10.1.2 Product Portfolio
 - 5.10.2 Business Strategies
 - 5.10.2.1 New Product Developments
 - 5.10.3 Corporate Strategies
 - 5.10.3.1 Partnerships, Collaborations, Agreements, and Contracts
 - 5.10.4 Analyst View
- 5.11 Pratt & Whitney Inc. (Part of Raytheon Technologies)
 - 5.11.1 Company Overview
 - 5.11.1.1 Role of Pratt & Whitney Inc. (Part of Raytheon Technologies) in the Global UAV Propulsion System Market
 - 5.11.1.2 Product Portfolio
 - 5.11.2 Business Strategies
 - 5.11.2.1 New Product Developments and Fundings
 - 5.2.10.1 Corporate Strategies

- 5.11.2.2 Partnerships, Collaborations, Agreements, and Contracts
- 5.11.3 Analyst View
- 5.12 Avio Aero (GE Aviation)
 - 5.12.1 Company Overview
 - 5.12.1.1 Role of Avio Aero (GE Aviation) in the Global UAV Propulsion System Market
 - 5.12.1.2 Product Portfolio
 - 5.12.2 Corporate Strategies
 - 5.12.2.1 Partnerships, Collaborations, Agreements, and Contracts
 - 5.12.3 Analyst View
- 5.13 Rolls-Royce Holdings PLC
 - 5.13.1 Company Overview
 - 5.13.1.1 Role of Rolls-Royce Holdings PLC in the Global UAV Propulsion System Market
 - 5.13.1.2 Product Portfolio
 - 5.13.2 Business Strategies
 - 5.13.2.1 New Product Developments and Fundings
 - 5.13.3 Corporate Strategies
 - 5.13.3.1 Partnerships, Collaborations, Agreements, and Contracts
 - 5.13.4 Analyst View
- 5.14 PBS India (Part of PBS Aerospace)
 - 5.14.1 Company Overview
 - 5.14.1.1 Role of PBS India (Part of PBS Aerospace) in the Global UAV Propulsion System Market
 - 5.14.1.2 Product Portfolio
 - 5.14.2 Business Strategies
 - 5.14.2.1 New Product Developments and Fundings
 - 5.14.3 Analyst View
- 5.15 UAV Turbines Inc. (Subsidiary of Locust USA Inc.)
 - 5.15.1 Company Overview
 - 5.15.1.1 Role of UAV Turbines Inc. (Subsidiary of Locust USA Inc.) in the Global UAV Propulsion System Market
 - 5.15.1.2 Product Portfolio
 - 5.15.2 Business Strategies
 - 5.15.2.1 New Product Developments and Fundings
 - 5.15.3 Analyst View
- 5.16 Other Key Players
 - 5.16.1 Safran Helicopter Engines
 - 5.16.1.1 Company Overview

- 5.16.2 Tusas Engine Industries
 - 5.16.2.1 Company Overview
- 5.16.3 Delta Hawk Engines Inc.
 - 5.16.3.1 Company Overview
- 5.16.4 Kratos Defense & Security Solutions, Inc.
 - 5.16.4.1 Company Overview
- 5.16.5 Danielson Aircraft Systems Ltd.
 - 5.16.5.1 Company Overview
- 5.16.6 Northwest UAV Propulsion Systems
 - 5.16.6.1 Company Overview

6 GROWTH OPPORTUNITIES AND RECOMMENDATION

6.1 Growth Opportunities

- 6.1.1 Transition from Electric to IC Engine Propulsion
 - 6.1.1.1 Growth Opportunity 1: Development of Smaller IC Engines
 - 6.1.1.2 Recommendations for UAV Propulsion System Manufacturers
 - 6.1.1.3 Recommendations for UAV Manufacturers
- 6.1.2 Development of Cost-Effective Manufacturing Techniques
 - 6.1.2.1 Growth Opportunity 2: Metal 3D Printing of Engine and Associated Components
 - 6.1.2.2 Recommendations for UAV Propulsion System Manufacturers
 - 6.1.2.3 Recommendations for UAV Manufacturers

7 RESEARCH METHODOLOGY

7.1 Factors for Data Prediction and Modeling

List Of Figures

LIST OF FIGURES

- Figure 1: Global UAV Propulsion System Market, Units, 2022-2033
- Figure 2: Global UAV Propulsion System Market, \$Billion, 2022-2033
- Figure 3: Global UAV Propulsion System Market (by UAV Type), Units, 2023 and 2033
- Figure 4: Global UAV Propulsion System Market (by UAV Type), \$Million, 2023 and 2033
- Figure 5: Global UAV Propulsion System Market (by End User), Units, 2023 and 2033
- Figure 6: Global UAV Propulsion System Market (by End User), \$Million, 2023 and 2033
- Figure 7: Global UAV Propulsion System Market (by Engine Horsepower), Units, 2023 and 2033
- Figure 8: Global UAV Propulsion System Market (by Engine Horsepower), \$Million, 2023 and 2033
- Figure 9: Global UAV Propulsion System Market (by Engine Type), Units, 2023 and 2033
- Figure 10: Global UAV Propulsion System Market (by Engine Type), \$Million, 2023 and 2033
- Figure 11: Global UAV Propulsion System Market (by Region), \$Billion, 2023
- Figure 12: Global UAV Propulsion System Market Coverage
- Figure 13: Supply Chain Analysis of the Global UAV Propulsion System Market
- Figure 14: Supply Chain Analysis: Procurement of Raw Materials
- Figure 15: Supply Chain Analysis: End Users
- Figure 16: Global UAV Propulsion System Market, Business Dynamics
- Figure 17: Share of Key Business Strategies and Developments, January 2020-January 2023
- Figure 18: Global UAV Propulsion System Market (by UAV Type)
- Figure 19: Global UAV Propulsion System Market (by End User)
- Figure 20: Global UAV Propulsion System Market (by Engine Horsepower)
- Figure 21: Global UAV Propulsion System Market (by Engine Horsepower)
- Figure 22: Global UAV Propulsion System Market Share (by Company), \$Million, 2022
- Figure 23: Research Methodology
- Figure 24: Bottom-Up Approach
- Figure 25: Assumptions and Limitations

List Of Tables

LIST OF TABLES

Table 1: Illustrative Examples of Key UAV Use-Cases Compatible with IC Engine Solutions

Table 2: Comparative Assessment of Various IC Engines Deployed in UAVs

Table 3: Comparative Assessment of Various IC Engines deployed in UAVs on the Basis of Technical Parameters

Table 4: Details on Ongoing and Upcoming Programs for UAV propulsion system—Contracts, Investments, and Other Developments

Table 5: 12. List of Key Suppliers Operating in the UAV Propulsion System Market

Table 6: Start-ups and Investment Landscape: Investments, Collaborations, Agreements, and Other Developments

Table 7: Business strategies: New Product Launches, Developments, and Others, January 2020-January 2023

Table 8: Partnerships, Collaborations, Agreements, Contracts, and Others, January 2020-January 2023

Table 9: Global UAV Propulsion System Market (by UAV Type), Units, 2022-2033

Table 10: Global UAV Propulsion System Market (by UAV Type), \$Million, 2022-2033

Table 11: Global UAV Propulsion System Market (by End User), Units, 2022-2033

Table 12: Global UAV Propulsion System Market (by End User), \$Million, 2022-2033

Table 13: UAV Propulsion System Market (by Commercial End User), Units, 2022-2033

Table 14: UAV Propulsion System Market (by Commercial End User), \$Million, 2022-2033

Table 15: Global UAV Propulsion System Market (by Military End User), Units, 2022-2033

Table 16: Global UAV Propulsion System Market (by Military End User), \$Million, 2022-2033

Table 17: Global UAV Propulsion System Market (by Civil Government End User), Units, 2022-2033

Table 18: Global UAV Propulsion System Market (by Civil Government End User), \$Million, 2022-2033

Table 19: Global UAV Propulsion System Market (by Engine Horsepower), Units, 2022-2033

Table 20: Global UAV Propulsion System Market (by Engine Horsepower), \$Million, 2022-2033

Table 21: Global UAV Propulsion System Market (by Engine Type), Units, 2022-2033

Table 22: Global UAV Propulsion System Market (by Engine Type), \$Million, 2022-2033

Table 23: Global UAV Propulsion System Market (by Region), Units, 2022-2033

Table 24: Global UAV Propulsion System Market (by Region), \$Million, 2022-2033

Table 25: North America UAV Propulsion System Market (by UAV Type), Units, 2022-2033

Table 26: North America UAV Propulsion System Market (by UAV Type), \$Million, 2022-2033

Table 27: North America UAV Propulsion System Market (by End User), Units, 2022-2033

Table 28: North America UAV Propulsion System Market (by End User), \$Million, 2022-2033

Table 29: North America UAV Propulsion System Market (by Commercial End User), Units, 2022-2033

Table 30: North America UAV Propulsion System Market (by Commercial End User), \$Million, 2022-2033

Table 31: North America UAV Propulsion System Market (by Military End User), Units, 2022-2033

Table 32: North America UAV Propulsion System Market (by Military End User), \$Million, 2022-2033

Table 33: North America UAV Propulsion System Market (by Civil Government End User), Units, 2022-2033

Table 34: North America UAV Propulsion System Market (by Civil Government End User), \$Million, 2022-2033

Table 35: North America UAV Propulsion System Market (by Engine Horsepower), Units, 2022-2033

Table 36: North America UAV Propulsion System Market (by Engine Horsepower), \$Million, 2022-2033

Table 37: North America UAV Propulsion System Market (by Engine Type), Units, 2022-2033

Table 38: North America UAV Propulsion System Market (by Engine Type), \$Million, 2022-2033

Table 39: U.S. UAV Propulsion System Market (by UAV Type), Units, 2022-2033

Table 40: U.S. UAV Propulsion System Market (by UAV Type), \$Million, 2022-2033

Table 41: U.S. UAV Propulsion System Market (by End User), Units, 2022-2033

Table 42: U.S. UAV Propulsion System Market (by End User), \$Million, 2022-2033

Table 43: U.S. UAV Propulsion System Market (by Commercial End User), Units, 2022-2033

Table 44: U.S. UAV Propulsion System Market (by Commercial End User), \$Million, 2022-2033

Table 45: U.S. UAV Propulsion System Market (by Military End User), Units, 2022-2033

Table 46: U.S. UAV Propulsion System Market (by Military End User), \$Million, 2022-2033

Table 47: U.S. UAV Propulsion System Market (by Civil Government End User), Units, 2022-2033

Table 48: U.S. UAV Propulsion System Market (by Civil Government End User), \$Million, 2022-2033

Table 49: U.S. UAV Propulsion System Market (by Engine Horsepower), Units, 2022-2033

Table 50: U.S. UAV Propulsion System Market (by Engine Horsepower), \$Million, 2022-2033

Table 51: U.S. UAV Propulsion System Market (by Engine Type), Units, 2022-2033

Table 52: U.S. UAV Propulsion System Market (by Engine Type), \$Million, 2022-2033

Table 53: Canada UAV Propulsion System Market (by UAV Type), Units, 2022-2033

Table 54: Canada UAV Propulsion System Market (by UAV Type), \$Million, 2022-2033

Table 55: Canada UAV Propulsion System Market (by End User), Units, 2022-2033

Table 56: Canada UAV Propulsion System Market (by End User), \$Million, 2022-2033

Table 57: Canada UAV Propulsion System Market (by Commercial End User), Units, 2022-2033

Table 58: Canada UAV Propulsion System Market (by Commercial End User), \$Million, 2022-2033

Table 59: Canada UAV Propulsion System Market (by Military End User), Units, 2022-2033

Table 60: Canada UAV Propulsion System Market (by Military End User), \$Million, 2022-2033

Table 61: Canada UAV Propulsion System Market (by Civil Government End User), Units, 2022-2033

Table 62: Canada UAV Propulsion System Market (by Civil Government End User), \$Million, 2022-2033

Table 63: Canada UAV Propulsion System Market (by Engine Horsepower), Units, 2022-2033

Table 64: Canada UAV Propulsion System Market (by Engine Horsepower), \$Million, 2022-2033

Table 65: Canada UAV Propulsion System Market (by Engine Type), Units, 2022-2033

Table 66: Canada UAV Propulsion System Market (by Engine Type), \$Million, 2022-2033

Table 67: Europe UAV Propulsion System Market (by UAV Type), Units, 2022-2033

Table 68: Europe UAV Propulsion System Market (by UAV Type), \$Million, 2022-2033

Table 69: Europe UAV Propulsion System Market (by End User), Units, 2022-2033

Table 70: Europe UAV Propulsion System Market (by End User), \$Million, 2022-2033

Table 71: Europe UAV Propulsion System Market (by Commercial End User), Units, 2022-2033

Table 72: Europe UAV Propulsion System Market (by Commercial End User), \$Million, 2022-2033

Table 73: Europe UAV Propulsion System Market (by Military End User), Units, 2022-2033

Table 74: Europe UAV Propulsion System Market (by Military End User), \$Million, 2022-2033

Table 75: Europe UAV Propulsion System Market (by Civil Government End User), Units, 2022-2033

Table 76: Europe UAV Propulsion System Market (by Civil Government End User), \$Million, 2022-2033

Table 77: Europe UAV Propulsion System Market (by Engine Horsepower), Units, 2022-2033

Table 78: Europe UAV Propulsion System Market (by Engine Horsepower), \$Million, 2022-2033

Table 79: Europe UAV Propulsion System Market (by Engine Type), Units, 2022-2033

Table 80: Europe UAV Propulsion System Market (by Engine Type), \$Million, 2022-2033

Table 81: France UAV Propulsion System Market (by UAV Type), Units, 2022-2033

Table 82: France UAV Propulsion System Market (by UAV Type), \$Million, 2022-2033

Table 83: France UAV Propulsion System Market (by End User), Units, 2022-2033

Table 84: France UAV Propulsion System Market (by End User), \$Million, 2022-2033

Table 85: France UAV Propulsion System Market (by Commercial End User), Units, 2022-2033

Table 86: France UAV Propulsion System Market (by Commercial End User), \$Million, 2022-2033

Table 87: France UAV Propulsion System Market (by Military End User), Units, 2022-2033

Table 88: France UAV Propulsion System Market (by Military End User), \$Million, 2022-2033

Table 89: France UAV Propulsion System Market (by Civil Government End User), Units, 2022-2033

Table 90: France UAV Propulsion System Market (by Civil Government End User), \$Million, 2022-2033

Table 91: France UAV Propulsion System Market (by Engine Horsepower), Units, 2022-2033

Table 92: France UAV Propulsion System Market (by Engine Horsepower), \$Million, 2022-2033

Table 93: France UAV Propulsion System Market (by Engine Type), Units, 2022-2033

Table 94: France UAV Propulsion System Market (by Engine Type), \$Million, 2022-2033

Table 95: Germany UAV Propulsion System Market (by UAV Type), Units, 2022-2033

Table 96: Germany UAV Propulsion System Market (by UAV Type), \$Million, 2022-2033

Table 97: Germany UAV Propulsion System Market (by End User), Units, 2022-2033

Table 98: Germany UAV Propulsion System Market (by End User), \$Million, 2022-2033

Table 99: Germany UAV Propulsion System Market (by Commercial End User), Units, 2022-2033

Table 100: Germany UAV Propulsion System Market (by Commercial End User), \$Million, 2022-2033

Table 101: Germany UAV Propulsion System Market (by Military End User), Units, 2022-2033

Table 102: Germany UAV Propulsion System Market (by Military End User), \$Million, 2022-2033

Table 103: Germany UAV Propulsion System Market (by Civil Government End User), Units, 2022-2033

Table 104: Germany UAV Propulsion System Market (by Civil Government End User), \$Million, 2022-2033

Table 105: Germany UAV Propulsion System Market (by Engine Horsepower), Units, 2022-2033

Table 106: Germany UAV Propulsion System Market (by Engine Horsepower), \$Million, 2022-2033

Table 107: Germany UAV Propulsion System Market (by Engine Type), Units, 2022-2033

Table 108: Germany UAV Propulsion System Market (by Engine Type), \$Million, 2022-2033

Table 109: U.K. UAV Propulsion System Market (by UAV Type), Units, 2022-2033

Table 110: U.K. UAV Propulsion System Market (by UAV Type), Units, 2022-2033

Table 111: U.K. UAV Propulsion System Market (by End User), Units, 2022-2033

Table 112: U.K. UAV Propulsion System Market (by End User), \$Million, 2022-2033

Table 113: U.K. UAV Propulsion System Market (by Commercial End User), Units, 2022-2033

Table 114: U.K. UAV Propulsion System Market (by Commercial End User), \$Million, 2022-2033

Table 115: U.K. UAV Propulsion System Market (by Military End User), Units, 2022-2033

Table 116: U.K. UAV Propulsion System Market (by Military End User), \$Million, 2022-2033

Table 117: U.K. UAV Propulsion System Market (by Civil Government End User), Units, 2022-2033

Table 118: U.K. UAV Propulsion System Market (by Civil Government End User), \$Million, 2022-2033

Table 119: U.K. UAV Propulsion System Market (by Engine Horsepower), Units, 2022-2033

Table 120: U.K. UAV Propulsion System Market (by Engine Horsepower), \$Million, 2022-2033

Table 121: U.K. UAV Propulsion System Market (by Engine Type), Units, 2022-2033

Table 122: U.K. UAV Propulsion System Market (by Engine Type), \$Million, 2022-2033

Table 123: Rest-of-Europe UAV Propulsion System Market (by UAV Type), Units, 2022-2033

Table 124: Rest-of-Europe UAV Propulsion System Market (by UAV Type), \$Million, 2022-2033

Table 125: Rest-of-Europe UAV Propulsion System Market (by End User), Units, 2022-2033

Table 126: Rest-of-Europe UAV Propulsion System Market (by End User), \$Million, 2022-2033

Table 127: Rest-of-Europe UAV Propulsion System Market (by Commercial End User), Units, 2022-2033

Table 128: Rest-of-Europe UAV Propulsion System Market (by Commercial End User Type), \$Million, 2022-2033

Table 129: Rest-of-Europe UAV Propulsion System Market (by Military End User), Units, 2022-2033

Table 130: Rest-of-Europe UAV Propulsion System Market (by Military End User), \$Million, 2022-2033

Table 131: Rest-of-Europe UAV Propulsion System Market (by Civil Government End User), Units, 2022-2033

Table 132: Rest-of-Europe UAV Propulsion System Market (by Civil Government End User), \$Million, 2022-2033

Table 133: Rest-of-Europe UAV Propulsion System Market (by Engine Horsepower), Units, 2022-2033

Table 134: Rest-of-Europe UAV Propulsion System Market (by Engine Horsepower), \$Million, 2022-2033

Table 135: Rest-of-Europe UAV Propulsion System Market (by Engine Type), Units, 2022-2033

Table 136: Rest-of-Europe UAV Propulsion System Market (by Engine Type), \$Million, 2022-2033

Table 137: Asia-Pacific UAV Propulsion System Market (by UAV Type), Units,

2022-2033

Table 138: Asia-Pacific UAV Propulsion System Market (by UAV Type), \$Million, 2022-2033

Table 139: Asia-Pacific UAV Propulsion System Market (by End User), Units, 2022-2033

Table 140: Asia-Pacific UAV Propulsion System Market (by End User), \$Million, 2022-2033

Table 141: Asia-Pacific UAV Propulsion System Market (by Commercial End User), Units, 2022-2033

Table 142: Asia-Pacific UAV Propulsion System Market (by Commercial End User), \$Million, 2022-2033

Table 143: Asia-Pacific UAV Propulsion System Market (by Military End User), Units, 2022-2033

Table 144: Asia-Pacific UAV Propulsion System Market (by Military End User), \$Million, 2022-2033

Table 145: Asia-Pacific UAV Propulsion System Market (by Civil Government End User), Units, 2022-2033

Table 146: Asia-Pacific UAV Propulsion System Market (by Civil Government End User), \$Million, 2022-2033

Table 147: Asia-Pacific UAV Propulsion System Market (by Engine Horsepower), Units, 2022-2033

Table 148: Asia-Pacific UAV Propulsion System Market (by Engine Horsepower), \$Million, 2022-2033

Table 149: Asia-Pacific UAV Propulsion System Market (by Engine Type), Units, 2022-2033

Table 150: Asia-Pacific UAV Propulsion System Market (by Engine Type), \$Million, 2022-2033

Table 151: China UAV Propulsion System Market (by UAV Type), Units, 2022-2033

Table 152: China UAV Propulsion System Market (by UAV Type), \$Million, 2022-2033

Table 153: China UAV Propulsion System Market (by End User), Units, 2022-2033

Table 154: China UAV Propulsion System Market (by End User), \$Million, 2022-2033

Table 155: China UAV Propulsion System Market (by Commercial End user), Units, 2022-2033

Table 156: China UAV Propulsion System Market (by Commercial End User), \$Million, 2022-2033

Table 157: China UAV Propulsion System Market (by Military End User), Units, 2022-2033

Table 158: China UAV Propulsion System Market (by Military End User), \$Million, 2022-2033

Table 159: China UAV Propulsion System Market (by Civil Government End User), Units, 2022-2033

Table 160: China UAV Propulsion System Market (by Civil Government End User), \$Million, 2022-2033

Table 161: China UAV Propulsion System Market (by Engine Horsepower), Units, 2022-2033

Table 162: China UAV Propulsion System Market (by Engine Horsepower), \$Million, 2022-2033

Table 163: China UAV Propulsion System Market (by Engine Type), Units, 2022-2033

Table 164: China UAV Propulsion System Market (by Engine Type), \$Million, 2022-2033

Table 165: India UAV Propulsion System Market (by UAV Type), Units, 2022-2033

Table 166: India UAV Propulsion System Market (by UAV Type), \$Million, 2022-2033

Table 167: India UAV Propulsion System Market (by End User), Units, 2022-2033

Table 168: India UAV Propulsion System Market (by End User), \$Million, 2022-2033

Table 169: India UAV Propulsion System Market (by Commercial End user), Units, 2022-2033

Table 170: India UAV Propulsion System Market (by Commercial End User), \$Million, 2022-2033

Table 171: India UAV Propulsion System Market (by Military End User), Units, 2022-2033

Table 172: India UAV Propulsion System Market (by Military End User), \$Million, 2022-2033

Table 173: India UAV Propulsion System Market (by Civil Government End User), Units, 2022-2033

Table 174: India UAV Propulsion System Market (by Civil Government End User), \$Million, 2022-2033

Table 175: India UAV Propulsion System Market (by Engine Horsepower), Units, 2022-2033

Table 176: India UAV Propulsion System Market (by Engine Horsepower), \$Million, 2022-2033

Table 177: India UAV Propulsion System Market (by Engine Type), Units, 2022-2033

Table 178: India UAV Propulsion System Market (by Engine Type), \$Million, 2022-2033

Table 179: Japan UAV Propulsion System Market (by UAV Type), Units, 2022-2033

Table 180: Japan UAV Propulsion System Market (by UAV Type), \$Million, 2022-2033

Table 181: Japan UAV Propulsion System Market (by End User), Units, 2022-2033

Table 182: Japan UAV Propulsion System Market (by End User), \$Million, 2022-2033

Table 183: Japan UAV Propulsion System Market (by Commercial End User), Units, 2022-2033

Table 184: Japan UAV Propulsion System Market (by Commercial End User), \$Million, 2022-2033

Table 185: Japan UAV Propulsion System Market (by Military End User), Units, 2022-2033

Table 186: Japan UAV Propulsion System Market (by Military End User), \$Million, 2022-2033

Table 187: Japan UAV Propulsion System Market (by Civil Government End User), Units, 2022-2033

Table 188: Japan UAV Propulsion System Market (by Civil Government End User), \$Million, 2022-2033

Table 189: Japan UAV Propulsion System Market (by Engine Horsepower), Units, 2022-2033

Table 190: Japan UAV Propulsion System Market (by Engine Horsepower), \$Million, 2022-2033

Table 191: Japan UAV Propulsion System Market (by Engine Type), Units, 2022-2033

Table 192: Japan UAV Propulsion System Market (by Engine Type), \$Million, 2022-2033

Table 193: Rest-of-Asia-Pacific UAV Propulsion System Market (by UAV Type), Units, 2022-2033

Table 194: Rest-of-Asia-Pacific UAV Propulsion System Market (by UAV Type), \$Million, 2022-2033

Table 195: Rest-of-Asia-Pacific UAV Propulsion System Market (by End User), Units, 2022-2033

Table 196: Rest-of-Asia-Pacific UAV Propulsion System Market (by End User), \$Million, 2022-2033

Table 197: Rest-of-Asia-Pacific UAV Propulsion System Market (by Commercial End User), Units, 2022-2033

Table 198: Rest-of-Asia-Pacific UAV Propulsion System Market (by Commercial End User), \$Million, 2022-2033

Table 199: Rest-of-Asia-Pacific UAV Propulsion System Market (by Military End User), Units, 2022-2033

Table 200: Rest-of-Asia-Pacific UAV Propulsion System Market (by Military End User), \$Million, 2022-2033

Table 201: Rest-of-Asia-Pacific UAV Propulsion System Market (by Civil Government End User), Units, 2022-2033

Table 202: Rest-of-Asia-Pacific UAV Propulsion System Market (by Civil Government End User), \$Million, 2022-2033

Table 203: Rest-of-Asia-Pacific UAV Propulsion System Market (by Engine Horsepower), Units, 2022-2033

Table 204: Rest-of-Asia-Pacific UAV Propulsion System Market (by Engine Horsepower), \$Million, 2022-2033

Table 205: Rest-of-Asia-Pacific UAV Propulsion System Market (by Engine Type), Units, 2022-2033

Table 206: Rest-of-Asia-Pacific UAV Propulsion System Market (by Engine Type), \$Million, 2022-2033

Table 207: Rest-of-the-World UAV Propulsion System Market (by UAV Type), Units, 2022-2033

Table 208: Rest-of-the-World UAV Propulsion System Market (by UAV Type), \$Million, 2022-2033

Table 209: Rest-of-the-World UAV Propulsion System Market (by End User), Units, 2022-2033

Table 210: Rest-of-the-World UAV Propulsion System Market (by End User), \$Million, 2022-2033

Table 211: Rest-of-the-World UAV Propulsion System Market (by Commercial End User), Units, 2022-2033

Table 212: Rest-of-the-World UAV Propulsion System Market (by Commercial End User), \$Million, 2022-2033

Table 213: Rest-of-the-World UAV Propulsion System Market (by Military End User), Units, 2022-2033

Table 214: Rest-of-the-World UAV Propulsion System Market (by Military End User), \$Million, 2022-2033

Table 215: Rest-of-the-World UAV Propulsion System Market (by Civil Government End User), Units, 2022-2033

Table 216: Rest-of-the-World UAV Propulsion System Market (by Civil Government End User), \$Million, 2022-2033

Table 217: Rest-of-the-World UAV Propulsion System Market (by Engine Horsepower), Units, 2022-2033

Table 218: Rest-of-the-World UAV Propulsion System Market (by Engine Horsepower), \$Million, 2022-2033

Table 219: Rest-of-the-World UAV Propulsion System Market (by Engine Type), Units, 2022-2033

Table 220: Rest-of-the-World UAV Propulsion System Market (by Engine Type), \$Million, 2022-2033

Table 221: Middle East and Africa UAV Propulsion System Market (by UAV Type), Units, 2022-2033

Table 222: Middle East and Africa UAV Propulsion System Market (by UAV Type), \$Million, 2022-2033

Table 223: Middle East and Africa UAV Propulsion System Market (by End User), Units,

2022-2033

Table 224: Middle East and Africa UAV Propulsion System Market (by End User), \$Million, 2022-2033

Table 225: Middle East and Africa UAV Propulsion System Market (by Commercial End User), Units, 2022-2033

Table 226: Middle East and Africa UAV Propulsion System Market (by Commercial End User), \$Million, 2022-2033

Table 227: Middle East and Africa UAV Propulsion System Market (by Military End User), Units, 2022-2033

Table 228: Middle East and Africa UAV Propulsion System Market (by Military End User), \$Million, 2022-2033

Table 229: Middle East and Africa UAV Propulsion System Market (by Civil Government End User), Units, 2022-2033

Table 230: Middle East and Africa UAV Propulsion System Market (by Civil Government End User), \$Million, 2022-2033

Table 231: Middle East and Africa UAV Propulsion System Market (by Engine Horsepower), Units, 2022-2033

Table 232: Middle East and Africa UAV Propulsion System Market (by Engine Horsepower), \$Million, 2022-2033

Table 233: Middle East and Africa UAV Propulsion System Market (by Engine Type), Units, 2022-2033

Table 234: Middle East and Africa UAV Propulsion System Market (by Engine Type), \$Million, 2022-2033

Table 235: Latin America UAV Propulsion System Market (by UAV Type), Units, 2022-2033

Table 236: Latin America UAV Propulsion System Market (by UAV Type), \$Million, 2022-2033

Table 237: Latin America UAV Propulsion System Market (by End User), Units 2022-2033

Table 238: Latin America UAV Propulsion System Market (by End User), \$Million, 2022-2033

Table 239: Latin America UAV Propulsion System Market (by Commercial End User), Units, 2022-2033

Table 240: Latin America UAV Propulsion System Market (by Commercial End User), \$Million, 2022-2033

Table 241: Latin America UAV Propulsion System Market (by Military End User), Units, 2022-2033

Table 242: Latin America UAV Propulsion System Market (by Military End User), \$Million, 2022-2033

Table 243: Latin America UAV Propulsion System Market (by Civil Government End User), Units, 2022-2033

Table 244: Latin America UAV Propulsion System Market (by Civil Government End User), \$Million, 2022-2033

Table 245: Latin America UAV Propulsion System Market (by Engine Horsepower), Units, 2022-2033

Table 246: Latin America UAV Propulsion System Market (by Engine Horsepower), \$Million, 2022-2033

Table 247: Latin America UAV Propulsion System Market (by Engine Type), Units, 2022-2033

Table 248: Latin America UAV Propulsion System Market (by Engine Type), \$Million, 2022-2033

Table 249: 3W International GmbH: Product Portfolio

Table 250: 3W International GmbH: New Product Developments

Table 251: 3W International GmbH: Partnerships, Collaborations, Agreements, and Contracts

Table 252: BRP-Rotax GmbH & Co KG: Product Portfolio

Table 253: BRP-Rotax GmbH & Co KG.: New Product Developments and Fundings

Table 254: BRP-Rotax GmbH & Co KG: Partnerships, Collaborations, Agreements, and Contracts

Table 255: Diamond Aircraft Industries (Austro Engine): Product Portfolio

Table 256: Diamond Aircraft Industries (Austro Engine): Partnerships, Collaborations, Agreements, and Contracts

Table 257: Gemini Diesel (Superior Aviation Group): Product Portfolio

Table 258: Gemini Diesel (Superior Aviation Group): Partnerships, Collaborations, Agreements, Contracts, Mergers and Acquisitions

Table 259: HIRTH ENGINES GMBH: Product Portfolio

Table 260: HIRTH ENGINES GMBH: New Product Developments

Table 261: HIRTH ENGINES GMBH: Partnerships, Collaborations, Agreements, and Contracts

Table 262: Rotron Power Ltd.: Product Portfolio

Table 263: Rotron Power Ltd.: Partnerships, Collaborations, Agreements, and Contracts

Table 264: Suter Industries AG: Product Portfolio

Table 265: Suter Industries AG: Partnerships, Collaborations, Agreements, and Contracts

Table 266: UAV Engines Ltd.: Product Portfolio

Table 267: Advanced Innovative Engineering Ltd.: Product Portfolio

Table 268: Advanced Innovative Engineering Ltd.: New Product Developments

Table 269: Advanced Innovative Engineering Ltd.: Partnerships, Collaborations,

Agreements, and Contracts

Table 270: Pratt & Whitney Inc. (Part of Raytheon Technologies): Product Portfolio

Table 271: Pratt & Whitney Inc. (Part of Raytheon Technologies): New Product Developments and Fundings

Table 272: Pratt & Whitney Inc. (Part of Raytheon Technologies): Partnerships, Collaborations, Agreements, Contracts, Mergers and Acquisitions

Table 273: Avio Aero (GE Aviation): Product Portfolio

Table 274: Avio Aero (GE Aviation): Partnerships, Collaborations, Agreements, and Contracts

Table 275: Rolls-Royce Holdings PLC: Product Portfolio

Table 276: Rolls-Royce Holdings PLC: New Product Developments and Fundings

Table 277: Rolls-Royce Holdings PLC: Partnerships, Collaborations, Agreements, and Contracts

Table 278: PBS India (Part of PBS Aerospace): Product Portfolio

Table 279: PBS India (Part of PBS Aerospace): New Product Developments and Fundings

Table 280: UAV Turbines Inc. (Subsidiary of Locust USA Inc.): Product Portfolio

Table 281: UAV Turbines Inc. (Subsidiary of Locust USA Inc.): New Product Developments and Fundings

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