

# **Unmanned Loitering Munition Market - A Global and Regional Analysis: Focus on Platform, Range, Operation Mode, Component and Region - Analysis and Forecast, 2023-2033**

<https://marketpublishers.com/r/UDC8E7AEC707EN.html>

Date: June 2023

Pages: 166

Price: US\$ 5,500.00 (Single User License)

ID: UDC8E7AEC707EN

## **Abstracts**

### Introduction to the Global Unmanned Loitering Munition Market

The global unmanned loitering munition market has experienced remarkable growth in recent years due to technological advancements and increasing demand for precise, efficient, and cost-effective military capabilities. Unmanned loitering munitions, also known as suicide drones or kamikaze drones, are autonomous or remotely operated explosive devices designed for reconnaissance, surveillance, and precision strike missions. Their ability to loiter on the battlefield for extended periods, actively searching for and engaging targets, is a key factor driving their demand. These systems provide tactical advantages by offering real-time situational awareness, target identification, and the ability to strike with pinpoint accuracy, contributing to more effective and efficient military operations. Moreover, their cost-effectiveness compared to traditional manned aircraft or missile systems makes them attractive options for nations with budget constraints.

The evolution of sensor and guidance technologies, including advanced sensors such as electro-optical/infrared cameras and synthetic aperture radar, as well as the integration of artificial intelligence and machine learning algorithms, has further enhanced the effectiveness and lethality of unmanned loitering munitions. The market can be segmented based on platform type, range, operation mode, and component, and it is expected to witness continued growth as key players and defense forces invest in research and development to enhance performance and effectiveness, leading to new opportunities for growth and innovation in the sector.

## Market Introduction

The global unmanned loitering munition market has witnessed significant growth and advancements in recent years. Loitering munitions are a category of aerial weapon systems designed to loiter around the target area until a target is located, enabling faster reaction times and more selective targeting. Originally developed in the 1980s as specialized weapons to target anti-aircraft systems, loitering munitions have evolved to become alternatives to airstrikes, mortar rounds, and grenade tosses.

Furthermore, in the field of loitering munitions, the focus has shifted from manual operation to autonomous capabilities. These systems now rely on advanced algorithms, machine learning (ML), and software-defined features to continually analyze large amounts of data in real time. The use of such intelligent systems allows for the detection, categorization, and identification of diverse signals, interference sources, and actionable information for operators.

## Industrial Impact

The global unmanned loitering munition market is witnessing rapid growth due to its unique capabilities in the aerospace and defense sector. These kamikaze drones provide operational flexibility, reduced risk to personnel, and enhanced strike capabilities. The increasing demand for precise strike capabilities in modern warfare, along with advancements in technology such as improved sensors and artificial intelligence, are driving the market growth. Geopolitical tensions and the need for border security and counter-terrorism measures further contribute to the adoption of unmanned loitering munitions. However, challenges such as limited drone range, regulatory uncertainties, and procurement complexities need to be addressed to expand the market further. Strategic planning and advancements in drone technology will play a crucial role in overcoming these challenges.

## Market Segmentation:

### Segmentation 1: by Platform

Ground-Based

Sea-Based

## Airborne

### Ground-Based Segment to Dominate the Platform Segment of the Global Unmanned Loitering Munition Market

The global unmanned loitering munition market is led by the ground-based platform, with a 68.43% share in 2023. Ground-based unmanned loitering munitions are poised to lead the market due to their demonstrated effectiveness, flexibility, versatility, cost-effectiveness, and technological advancements. These factors contribute to their growing demand and adoption by military forces worldwide. The major players offering ground-based unmanned loitering munition systems are Israel Aerospace Industries Ltd. (IAI), AeroVironment, Inc., Uvision, and others.

### Segmentation 2: by Operation Mode

#### Autonomous System

#### Manual System

The global unmanned loitering munition market is expected to be dominated by the manual system in 2023, with a 75.29% share in terms of revenue due to the high demand for unmanned systems with the feature to manually give permission to execute the target of interest.

Firstly, ground-based loitering munitions' lethal effectiveness has been proven in recent conflicts, gaining global attention and demand. Secondly, advancements in technology have made these munitions more capable, survivable, and autonomous, providing soldiers with a powerful battlefield tool. Additionally, the incorporation of AI, swarm technology, and improved sensors has enhanced its coordination and target engagement capabilities.

### Segmentation 3: by Range

#### Short-Range

#### Medium-Range

## Long-Range

### Long-Range to Witness the Highest Growth between 2023 and 2033

The global unmanned loitering munition market is expected to be dominated by the medium-range in 2023, with a 48.2% share in terms of revenue due to the high demand for medium-range systems which arise from military or security forces operating in vast regions, border surveillance applications, or scenarios requiring standoff capabilities while maintaining operational flexibility.

### Segmentation 4: by Component

Hardware

Software

The global unmanned loitering munition market is expected to witness huge revenues from the hardware segment, followed by the software segment.

### Segmentation 5: by Region

North America - U.S.

Europe - U.K., France, Germany, Russia, Ukraine, Poland, and Rest-of-Europe

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

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

Rest-of-the-World is anticipated to grow at a CAGR of 3.13%. The presence of established unmanned loitering munition providers is driving the market in the region. The presence of major industry players such as Israel Aerospace Industries Ltd. (IAI), ADASI, and Textron Systems within the region with growth strategies such as partnerships are paving the way for market opportunities. Additionally, the market in the region is driven by the need for cost-effective unmanned aerial systems for combat purposes.

Middle East and Africa dominate the unmanned loitering munition market in the region. The country is actively involved through the U.S. Army, technological advancements, concentration of key industry players, a substantial defense budget, and supplying suicide drones to Ukraine. The increasing global demand for loitering munitions, showcased during the Ukraine-Russia conflict, has pushed manufacturers to enhance their products to stay competitive in the market.

### Recent Developments in the Global Unmanned Loitering Munition Market

In May 2023, Israel Aerospace Industries Ltd. (IAI) signed an agreement with the Republic of Estonia for the procurement of advanced long-range loitering munitions. The agreement would strengthen the Republic of Estonia's defense capability by enhancing its indirect fire capabilities.

In April 2023, AeroVironment, Inc. received a contract worth \$64.6 million from the U.S. Army Tactical Aviation and Ground Munitions (TAGM) to provide Switchblade 300 unmanned loitering systems. The U.S. Army Contracting Command, Redstone Arsenal, would oversee the contract, which is expected to be delivered by 2024.

In January 2023, BAYKAR TECH received a contract worth \$370 million from the Kuwait Defence Ministry to provide TB2 drones. The amount and delivery date of drones to be delivered were not disclosed.

### Demand – Drivers and Limitations

#### Market Demand Drivers: Increasing Deployment of Loitering Munition in Armed Conflicts

The rise of asymmetric warfare and counterinsurgency has driven the demand for loitering munitions. These cost-effective drones offer precision striking capabilities, ease of deployment, and lower costs compared to traditional airstrikes. Advancements in technology have made them more effective on the battlefield. Its operational effectiveness in real combat scenarios has fueled its adoption, leading to significant market growth.

#### Market Challenges: Range Limitations of Drones Chosen for Loitering Munition

The limited range of drones used in loitering munitions restricts their effectiveness and

applications. Advancements in drone technology are needed to overcome this challenge and enhance their capabilities.

### Market Opportunities: Emergence of Smart Loitering Munition Systems

One key advantage of smart loitering munitions is their ability to remotely search for and identify targets while loitering in a designated area. They can stay in the air for an extended period before launching an attack, making them versatile and effective.

How can this report add value to an organization?

**Product/Innovation Strategy:** The product segment helps the reader to understand the different types of solutions available for deployment and their potential globally. Moreover, the study provides the reader with a detailed understanding of the unmanned loitering munition by operation mode (autonomous system and manual system) and component (hardware and software).

**Growth/Marketing Strategy:** The global unmanned loitering munition market has seen major development by key players operating in the market, such as contracts, collaboration, and joint ventures. The favored strategy for the companies has strengthened their position in the global unmanned loitering munition market. For instance, in May 2023, Paramount Group signed an agreement with Hellenic Defence Systems (EAS) for the local production of long-range loitering munitions to encourage the indigenous manufacturing capabilities of the Greek defense industry. The loitering munition system called IRIX would be the first loitering munitions produced in Greece, while also one of the most advanced and long-range loitering munitions produced in Europe.

**Competitive Strategy:** Key players in the global unmanned loitering munition market analyzed and profiled in the study involve major unmanned loitering munition companies providing kamikaze drones, respectively. Moreover, a detailed competitive benchmarking of the players operating in the global unmanned loitering munition 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.

### Key Market Players and Competition Synopsis

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

The established players in the unmanned loitering munition market are around 79%, and the start-ups in the market are around 21% of the global unmanned loitering munition market.

### Key Companies Profiled:

ADASI

AeroVironment, Inc.

BAYKAR TECH

Denel Dynamics

Elbit Systems Ltd.

Israel Aerospace Industries Ltd. (IAI)

Nexter group KNDS

Paramount Group

Rheinmetall AG

Roketsan

SpearUAV

STM Savunma Teknolojileri Muhendislik ve Ticaret A.S.

Textron Systems

Turkish Aerospace Industries, Inc.

UVision Air Ltd.



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