

Global Military & Defense AI Data Labeling Supply, Demand and Key Producers, 2026-2032

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Abstracts

The global Military & Defense AI Data Labeling market size is expected to reach \$ 30264 million by 2032, rising at a market growth of 40.0% CAGR during the forecast period (2026-2032).

Military & Defense AI Data Labeling refers to the process of manually or semi-automatically annotating multimodal data (including images, videos, radar, infrared, UAV data, etc.) used in national defense and military applications for intelligence analysis, battlefield monitoring, target recognition, reconnaissance, and operational decision-making, producing structured labeled datasets for AI training. It excludes labeling of data from municipal or commercial security scenarios.

Pricing is clearly tiered, ranging from USD 0.05–0.5 per frame for standard image/video annotation, USD 1–5 per frame for 3D point cloud and multimodal data, and up to USD 10–100 per sample for highly specialized radar, RF, and acoustic data, dominated by a limited number of providers with signal-processing capabilities; gross margins show strong differentiation, with 20–35% for general annotation services and 40–60% for high-security and specialized data, while platform players further enhance profitability through tooling and data management capabilities; downstream demand is primarily driven by Intelligence, Surveillance & Reconnaissance (ISR) and Autonomous Systems, with incremental growth from Electronic Warfare & Signal Intelligence and Battlefield Situational Awareness; upstream relies on data acquisition systems such as satellites, UAVs, and radar, as well as compute and annotation toolchains, while downstream integrates into defense AI systems and operational platforms; the industry structure bifurcates into a US platform-based outsourcing model and a China system-integrated model, with key uncertainties stemming from defense budget fluctuations, data security regulations, and the pace of automation substitution; in conclusion, the industry is in a

high-growth phase, driven by increasing military AI adoption and rising multimodal data complexity, characterized by strong barriers in high-end data segments and gradual commoditization of low-end annotation.

This report studies the global Military & Defense AI Data Labeling demand, key companies, and key regions.

This report is a detailed and comprehensive analysis of the world market for Military & Defense AI Data Labeling, and provides market size (US\$ million) and Year-over-Year (YoY) growth, considering 2025 as the base year. This report explores demand trends and competition, as well as details the characteristics of Military & Defense AI Data Labeling that contribute to its increasing demand across many markets.

Highlights and key features of the study

Global Military & Defense AI Data Labeling total market, 2021-2032, (USD Million)

Global Military & Defense AI Data Labeling total market by region & country, CAGR, 2021-2032, (USD Million)

U.S. VS China: Military & Defense AI Data Labeling total market, key domestic companies, and share, (USD Million)

Global Military & Defense AI Data Labeling revenue by player, revenue and market share 2021-2026, (USD Million)

Global Military & Defense AI Data Labeling total market by Type, CAGR, 2021-2032, (USD Million)

Global Military & Defense AI Data Labeling total market by Application, CAGR, 2021-2032, (USD Million)

This report profiles major players in the global Military & Defense AI Data Labeling market based on the following parameters - company overview, revenue, gross margin, product portfolio, geographical presence, and key developments. Key companies covered as a part of this study include Scale AI, Labelbox, Appen, TELUS International AI, Surge AI, Palantir, Shield AI, Kili Technology, Latent AI, iMerit, etc.

This report also provides key insights about market drivers, restraints, opportunities, new product launches or approvals.

Stakeholders would have ease in decision-making through various strategy matrices used in analyzing the world Military & Defense AI Data Labeling market

Detailed Segmentation:

Each section contains quantitative market data including market by value (US\$ Millions), by player, by regions, by Type, and by Application. Data is given for the years 2021-2032 by year with 2025 as the base year, 2026 as the estimate year, and 2027-2032 as the forecast year.

Global Military & Defense AI Data Labeling Market, By Region:

United States

China

Europe

Japan

South Korea

ASEAN

India

Rest of World

Global Military & Defense AI Data Labeling Market, Segmentation by Type:

Object Detection & Tracking

Semantic Segmentation

Change Detection

Signal Classification

Entity Recognition

Sensor Fusion Alignment

Global Military & Defense AI Data Labeling Market, Segmentation by Modality:

- Image & Video Annotation
- Geospatial & Satellite Annotation
- Radar & RF Signal Annotation
- LiDAR & 3D Point Cloud Annotation
- Audio & Acoustic Annotation
- Text & Intelligence Annotation
- Multimodal Fusion Annotation

Global Military & Defense AI Data Labeling Market, Segmentation by Application:

- Intelligence, Surveillance & Reconnaissance (ISR)
- Autonomous Systems
- Electronic Warfare & Signal Intelligence
- Battlefield Situational Awareness
- Military Mapping & Navigation

Companies Profiled:

- Scale AI
- Labelbox
- Appen
- TELUS International AI

Surge AI

Palantir

Shield AI

Kili Technology

Latent AI

iMerit

CloudFactory

Cogito Tech

SuperAnnotate

Spear AI

4Paradigm

Synyi AI

ZhiHuishenZhou

Yitu Technology

Megvii

CloudWalk

CETC

CASIC

Key Questions Answered

1. How big is the global Military & Defense AI Data Labeling market?
2. What is the demand of the global Military & Defense AI Data Labeling market?
3. What is the year over year growth of the global Military & Defense AI Data Labeling market?
4. What is the total value of the global Military & Defense AI Data Labeling market?
5. Who are the Major Players in the global Military & Defense AI Data Labeling market?
6. What are the growth factors driving the market demand?

Contents

1 SUPPLY SUMMARY

- 1.1 Military & Defense AI Data Labeling Introduction
- 1.2 World Military & Defense AI Data Labeling Market Size & Forecast (2021 & 2025 & 2032)
- 1.3 World Military & Defense AI Data Labeling Total Market by Region (by Headquarter Location)
 - 1.3.1 World Military & Defense AI Data Labeling Market Size by Region (2021-2032), (by Headquarter Location)
 - 1.3.2 United States Based Company Military & Defense AI Data Labeling Revenue (2021-2032)
 - 1.3.3 China Based Company Military & Defense AI Data Labeling Revenue (2021-2032)
 - 1.3.4 Europe Based Company Military & Defense AI Data Labeling Revenue (2021-2032)
 - 1.3.5 Japan Based Company Military & Defense AI Data Labeling Revenue (2021-2032)
 - 1.3.6 South Korea Based Company Military & Defense AI Data Labeling Revenue (2021-2032)
 - 1.3.7 ASEAN Based Company Military & Defense AI Data Labeling Revenue (2021-2032)
 - 1.3.8 India Based Company Military & Defense AI Data Labeling Revenue (2021-2032)
- 1.4 Market Drivers, Restraints and Trends
 - 1.4.1 Military & Defense AI Data Labeling Market Drivers
 - 1.4.2 Factors Affecting Demand
 - 1.4.3 Major Market Trends

2 DEMAND SUMMARY

- 2.1 World Military & Defense AI Data Labeling Consumption Value (2021-2032)
- 2.2 World Military & Defense AI Data Labeling Consumption Value by Region
 - 2.2.1 World Military & Defense AI Data Labeling Consumption Value by Region (2021-2026)
 - 2.2.2 World Military & Defense AI Data Labeling Consumption Value Forecast by Region (2027-2032)
- 2.3 United States Military & Defense AI Data Labeling Consumption Value (2021-2032)
- 2.4 China Military & Defense AI Data Labeling Consumption Value (2021-2032)

- 2.5 Europe Military & Defense AI Data Labeling Consumption Value (2021-2032)
- 2.6 Japan Military & Defense AI Data Labeling Consumption Value (2021-2032)
- 2.7 South Korea Military & Defense AI Data Labeling Consumption Value (2021-2032)
- 2.8 ASEAN Military & Defense AI Data Labeling Consumption Value (2021-2032)
- 2.9 India Military & Defense AI Data Labeling Consumption Value (2021-2032)

3 WORLD MILITARY & DEFENSE AI DATA LABELING COMPANIES COMPETITIVE ANALYSIS

- 3.1 World Military & Defense AI Data Labeling Revenue by Player (2021-2026)
- 3.2 Industry Rank and Concentration Rate (CR)
 - 3.2.1 Global Military & Defense AI Data Labeling Industry Rank of Major Players
 - 3.2.2 Global Concentration Ratios (CR4) for Military & Defense AI Data Labeling in 2025
 - 3.2.3 Global Concentration Ratios (CR8) for Military & Defense AI Data Labeling in 2025
- 3.3 Military & Defense AI Data Labeling Company Evaluation Quadrant
- 3.4 Military & Defense AI Data Labeling Market: Overall Company Footprint Analysis
 - 3.4.1 Military & Defense AI Data Labeling Market: Region Footprint
 - 3.4.2 Military & Defense AI Data Labeling Market: Company Product Type Footprint
 - 3.4.3 Military & Defense AI Data Labeling Market: Company Product Application Footprint
- 3.5 Competitive Environment
 - 3.5.1 Historical Structure of the Industry
 - 3.5.2 Barriers of Market Entry
 - 3.5.3 Factors of Competition
- 3.6 Mergers & Acquisitions Activity

4 UNITED STATES VS CHINA VS REST OF WORLD (BY HEADQUARTER LOCATION)

- 4.1 United States VS China: Military & Defense AI Data Labeling Revenue Comparison (by Headquarter Location)
 - 4.1.1 United States VS China: Military & Defense AI Data Labeling Revenue Comparison (2021 & 2025 & 2032) (by Headquarter Location)
 - 4.1.2 United States VS China: Military & Defense AI Data Labeling Revenue Market Share Comparison (2021 & 2025 & 2032)
- 4.2 United States Based Companies VS China Based Companies: Military & Defense AI Data Labeling Consumption Value Comparison

4.2.1 United States VS China: Military & Defense AI Data Labeling Consumption Value Comparison (2021 & 2025 & 2032)

4.2.2 United States VS China: Military & Defense AI Data Labeling Consumption Value Market Share Comparison (2021 & 2025 & 2032)

4.3 United States Based Military & Defense AI Data Labeling Companies and Market Share, 2021-2026

4.3.1 United States Based Military & Defense AI Data Labeling Companies, Headquarters (States, Country)

4.3.2 United States Based Companies Military & Defense AI Data Labeling Revenue, (2021-2026)

4.4 China Based Companies Military & Defense AI Data Labeling Revenue and Market Share, 2021-2026

4.4.1 China Based Military & Defense AI Data Labeling Companies, Company Headquarters (Province, Country)

4.4.2 China Based Companies Military & Defense AI Data Labeling Revenue, (2021-2026)

4.5 Rest of World Based Military & Defense AI Data Labeling Companies and Market Share, 2021-2026

4.5.1 Rest of World Based Military & Defense AI Data Labeling Companies, Headquarters (Province, Country)

4.5.2 Rest of World Based Companies Military & Defense AI Data Labeling Revenue (2021-2026)

5 MARKET ANALYSIS BY TYPE

5.1 World Military & Defense AI Data Labeling Market Size Overview by Type: 2021 VS 2025 VS 2032

5.2 Segment Introduction by Type

5.2.1 Object Detection & Tracking

5.2.2 Semantic Segmentation

5.2.3 Change Detection

5.2.4 Signal Classification

5.2.5 Entity Recognition

5.2.6 Sensor Fusion Alignment

5.3 Market Segment by Type

5.3.1 World Military & Defense AI Data Labeling Market Size by Type (2021-2026)

5.3.2 World Military & Defense AI Data Labeling Market Size by Type (2027-2032)

5.3.3 World Military & Defense AI Data Labeling Market Size Market Share by Type (2027-2032)

6 MARKET ANALYSIS BY MODALITY

6.1 World Military & Defense AI Data Labeling Market Size Overview by Modality: 2021 VS 2025 VS 2032

6.2 Segment Introduction by Modality

6.2.1 Image & Video Annotation

6.2.2 Geospatial & Satellite Annotation

6.2.3 Radar & RF Signal Annotation

6.2.4 LiDAR & 3D Point Cloud Annotation

6.2.5 Audio & Acoustic Annotation

6.2.6 Text & Intelligence Annotation

6.2.7 Multimodal Fusion Annotation

6.3 Market Segment by Modality

6.3.1 World Military & Defense AI Data Labeling Market Size by Modality (2021-2026)

6.3.2 World Military & Defense AI Data Labeling Market Size by Modality (2027-2032)

6.3.3 World Military & Defense AI Data Labeling Market Size Market Share by Modality (2027-2032)

7 MARKET ANALYSIS BY APPLICATION

7.1 World Military & Defense AI Data Labeling Market Size Overview by Application: 2021 VS 2025 VS 2032

7.2 Segment Introduction by Application

7.2.1 Intelligence, Surveillance & Reconnaissance (ISR)

7.2.2 Autonomous Systems

7.2.3 Electronic Warfare & Signal Intelligence

7.2.4 Battlefield Situational Awareness

7.2.5 Military Mapping & Navigation

7.3 Market Segment by Application

7.3.1 World Military & Defense AI Data Labeling Market Size by Application (2021-2026)

7.3.2 World Military & Defense AI Data Labeling Market Size by Application (2027-2032)

7.3.3 World Military & Defense AI Data Labeling Market Size Market Share by Application (2021-2032)

8 COMPANY PROFILES

8.1 Scale AI

8.1.1 Scale AI Details

8.1.2 Scale AI Major Business

8.1.3 Scale AI Military & Defense AI Data Labeling Product and Services

8.1.4 Scale AI Military & Defense AI Data Labeling Revenue, Gross Margin and Market Share (2021-2026)

8.1.5 Scale AI Recent Developments/Updates

8.1.6 Scale AI Competitive Strengths & Weaknesses

8.2 Labelbox

8.2.1 Labelbox Details

8.2.2 Labelbox Major Business

8.2.3 Labelbox Military & Defense AI Data Labeling Product and Services

8.2.4 Labelbox Military & Defense AI Data Labeling Revenue, Gross Margin and Market Share (2021-2026)

8.2.5 Labelbox Recent Developments/Updates

8.2.6 Labelbox Competitive Strengths & Weaknesses

8.3 Appen

8.3.1 Appen Details

8.3.2 Appen Major Business

8.3.3 Appen Military & Defense AI Data Labeling Product and Services

8.3.4 Appen Military & Defense AI Data Labeling Revenue, Gross Margin and Market Share (2021-2026)

8.3.5 Appen Recent Developments/Updates

8.3.6 Appen Competitive Strengths & Weaknesses

8.4 TELUS International AI

8.4.1 TELUS International AI Details

8.4.2 TELUS International AI Major Business

8.4.3 TELUS International AI Military & Defense AI Data Labeling Product and Services

8.4.4 TELUS International AI Military & Defense AI Data Labeling Revenue, Gross Margin and Market Share (2021-2026)

8.4.5 TELUS International AI Recent Developments/Updates

8.4.6 TELUS International AI Competitive Strengths & Weaknesses

8.5 Surge AI

8.5.1 Surge AI Details

8.5.2 Surge AI Major Business

8.5.3 Surge AI Military & Defense AI Data Labeling Product and Services

8.5.4 Surge AI Military & Defense AI Data Labeling Revenue, Gross Margin and Market Share (2021-2026)

- 8.5.5 Surge AI Recent Developments/Updates
- 8.5.6 Surge AI Competitive Strengths & Weaknesses
- 8.6 Palantir
 - 8.6.1 Palantir Details
 - 8.6.2 Palantir Major Business
 - 8.6.3 Palantir Military & Defense AI Data Labeling Product and Services
 - 8.6.4 Palantir Military & Defense AI Data Labeling Revenue, Gross Margin and Market Share (2021-2026)
 - 8.6.5 Palantir Recent Developments/Updates
 - 8.6.6 Palantir Competitive Strengths & Weaknesses
- 8.7 Shield AI
 - 8.7.1 Shield AI Details
 - 8.7.2 Shield AI Major Business
 - 8.7.3 Shield AI Military & Defense AI Data Labeling Product and Services
 - 8.7.4 Shield AI Military & Defense AI Data Labeling Revenue, Gross Margin and Market Share (2021-2026)
 - 8.7.5 Shield AI Recent Developments/Updates
 - 8.7.6 Shield AI Competitive Strengths & Weaknesses
- 8.8 Kili Technology
 - 8.8.1 Kili Technology Details
 - 8.8.2 Kili Technology Major Business
 - 8.8.3 Kili Technology Military & Defense AI Data Labeling Product and Services
 - 8.8.4 Kili Technology Military & Defense AI Data Labeling Revenue, Gross Margin and Market Share (2021-2026)
 - 8.8.5 Kili Technology Recent Developments/Updates
 - 8.8.6 Kili Technology Competitive Strengths & Weaknesses
- 8.9 Latent AI
 - 8.9.1 Latent AI Details
 - 8.9.2 Latent AI Major Business
 - 8.9.3 Latent AI Military & Defense AI Data Labeling Product and Services
 - 8.9.4 Latent AI Military & Defense AI Data Labeling Revenue, Gross Margin and Market Share (2021-2026)
 - 8.9.5 Latent AI Recent Developments/Updates
 - 8.9.6 Latent AI Competitive Strengths & Weaknesses
- 8.10 iMerit
 - 8.10.1 iMerit Details
 - 8.10.2 iMerit Major Business
 - 8.10.3 iMerit Military & Defense AI Data Labeling Product and Services
 - 8.10.4 iMerit Military & Defense AI Data Labeling Revenue, Gross Margin and Market

Share (2021-2026)

8.10.5 iMerit Recent Developments/Updates

8.10.6 iMerit Competitive Strengths & Weaknesses

8.11 CloudFactory

8.11.1 CloudFactory Details

8.11.2 CloudFactory Major Business

8.11.3 CloudFactory Military & Defense AI Data Labeling Product and Services

8.11.4 CloudFactory Military & Defense AI Data Labeling Revenue, Gross Margin and

Market Share (2021-2026)

8.11.5 CloudFactory Recent Developments/Updates

8.11.6 CloudFactory Competitive Strengths & Weaknesses

8.12 Cogito Tech

8.12.1 Cogito Tech Details

8.12.2 Cogito Tech Major Business

8.12.3 Cogito Tech Military & Defense AI Data Labeling Product and Services

8.12.4 Cogito Tech Military & Defense AI Data Labeling Revenue, Gross Margin and

Market Share (2021-2026)

8.12.5 Cogito Tech Recent Developments/Updates

8.12.6 Cogito Tech Competitive Strengths & Weaknesses

8.13 SuperAnnotate

8.13.1 SuperAnnotate Details

8.13.2 SuperAnnotate Major Business

8.13.3 SuperAnnotate Military & Defense AI Data Labeling Product and Services

8.13.4 SuperAnnotate Military & Defense AI Data Labeling Revenue, Gross Margin

and Market Share (2021-2026)

8.13.5 SuperAnnotate Recent Developments/Updates

8.13.6 SuperAnnotate Competitive Strengths & Weaknesses

8.14 Spear AI

8.14.1 Spear AI Details

8.14.2 Spear AI Major Business

8.14.3 Spear AI Military & Defense AI Data Labeling Product and Services

8.14.4 Spear AI Military & Defense AI Data Labeling Revenue, Gross Margin and

Market Share (2021-2026)

8.14.5 Spear AI Recent Developments/Updates

8.14.6 Spear AI Competitive Strengths & Weaknesses

8.15 4Paradigm

8.15.1 4Paradigm Details

8.15.2 4Paradigm Major Business

8.15.3 4Paradigm Military & Defense AI Data Labeling Product and Services

8.15.4 4Paradigm Military & Defense AI Data Labeling Revenue, Gross Margin and Market Share (2021-2026)

8.15.5 4Paradigm Recent Developments/Updates

8.15.6 4Paradigm Competitive Strengths & Weaknesses

8.16 Synyi AI

8.16.1 Synyi AI Details

8.16.2 Synyi AI Major Business

8.16.3 Synyi AI Military & Defense AI Data Labeling Product and Services

8.16.4 Synyi AI Military & Defense AI Data Labeling Revenue, Gross Margin and Market Share (2021-2026)

8.16.5 Synyi AI Recent Developments/Updates

8.16.6 Synyi AI Competitive Strengths & Weaknesses

8.17 ZhiHuishenZhou

8.17.1 ZhiHuishenZhou Details

8.17.2 ZhiHuishenZhou Major Business

8.17.3 ZhiHuishenZhou Military & Defense AI Data Labeling Product and Services

8.17.4 ZhiHuishenZhou Military & Defense AI Data Labeling Revenue, Gross Margin and Market Share (2021-2026)

8.17.5 ZhiHuishenZhou Recent Developments/Updates

8.17.6 ZhiHuishenZhou Competitive Strengths & Weaknesses

8.18 Yitu Technology

8.18.1 Yitu Technology Details

8.18.2 Yitu Technology Major Business

8.18.3 Yitu Technology Military & Defense AI Data Labeling Product and Services

8.18.4 Yitu Technology Military & Defense AI Data Labeling Revenue, Gross Margin and Market Share (2021-2026)

8.18.5 Yitu Technology Recent Developments/Updates

8.18.6 Yitu Technology Competitive Strengths & Weaknesses

8.19 Megvii

8.19.1 Megvii Details

8.19.2 Megvii Major Business

8.19.3 Megvii Military & Defense AI Data Labeling Product and Services

8.19.4 Megvii Military & Defense AI Data Labeling Revenue, Gross Margin and Market Share (2021-2026)

8.19.5 Megvii Recent Developments/Updates

8.19.6 Megvii Competitive Strengths & Weaknesses

8.20 CloudWalk

8.20.1 CloudWalk Details

8.20.2 CloudWalk Major Business

- 8.20.3 CloudWalk Military & Defense AI Data Labeling Product and Services
- 8.20.4 CloudWalk Military & Defense AI Data Labeling Revenue, Gross Margin and Market Share (2021-2026)
- 8.20.5 CloudWalk Recent Developments/Updates
- 8.20.6 CloudWalk Competitive Strengths & Weaknesses
- 8.21 CETC
 - 8.21.1 CETC Details
 - 8.21.2 CETC Major Business
 - 8.21.3 CETC Military & Defense AI Data Labeling Product and Services
 - 8.21.4 CETC Military & Defense AI Data Labeling Revenue, Gross Margin and Market Share (2021-2026)
 - 8.21.5 CETC Recent Developments/Updates
 - 8.21.6 CETC Competitive Strengths & Weaknesses
- 8.22 CASIC
 - 8.22.1 CASIC Details
 - 8.22.2 CASIC Major Business
 - 8.22.3 CASIC Military & Defense AI Data Labeling Product and Services
 - 8.22.4 CASIC Military & Defense AI Data Labeling Revenue, Gross Margin and Market Share (2021-2026)
 - 8.22.5 CASIC Recent Developments/Updates
 - 8.22.6 CASIC Competitive Strengths & Weaknesses

9 INDUSTRY CHAIN ANALYSIS

- 9.1 Military & Defense AI Data Labeling Industry Chain
- 9.2 Military & Defense AI Data Labeling Upstream Analysis
- 9.3 Military & Defense AI Data Labeling Midstream Analysis
- 9.4 Military & Defense AI Data Labeling Downstream Analysis

10 RESEARCH FINDINGS AND CONCLUSION

11 APPENDIX

- 11.1 Methodology
- 11.2 Research Process and Data Source
- 11.3 Disclaimer

List Of Tables

LIST OF TABLES

- Table 1. World Military & Defense AI Data Labeling Revenue by Region (2021, 2025 and 2032) & (USD Million), (by Headquarter Location)
- Table 2. World Military & Defense AI Data Labeling Revenue by Region (2021-2026) & (USD Million), (by Headquarter Location)
- Table 3. World Military & Defense AI Data Labeling Revenue by Region (2027-2032) & (USD Million), (by Headquarter Location)
- Table 4. World Military & Defense AI Data Labeling Revenue Market Share by Region (2021-2026), (by Headquarter Location)
- Table 5. World Military & Defense AI Data Labeling Revenue Market Share by Region (2027-2032), (by Headquarter Location)
- Table 6. Major Market Trends
- Table 7. World Military & Defense AI Data Labeling Consumption Value Growth Rate Forecast by Region (2021 & 2025 & 2032) & (USD Million)
- Table 8. World Military & Defense AI Data Labeling Consumption Value by Region (2021-2026) & (USD Million)
- Table 9. World Military & Defense AI Data Labeling Consumption Value Forecast by Region (2027-2032) & (USD Million)
- Table 10. World Military & Defense AI Data Labeling Revenue by Player (2021-2026) & (USD Million)
- Table 11. Revenue Market Share of Key Military & Defense AI Data Labeling Players in 2025
- Table 12. World Military & Defense AI Data Labeling Industry Rank of Major Player, Based on Revenue in 2025
- Table 13. Global Military & Defense AI Data Labeling Company Evaluation Quadrant
- Table 14. Head Office of Key Military & Defense AI Data Labeling Players
- Table 15. Military & Defense AI Data Labeling Market: Company Product Type Footprint
- Table 16. Military & Defense AI Data Labeling Market: Company Product Application Footprint
- Table 17. Military & Defense AI Data Labeling Mergers & Acquisitions Activity
- Table 18. United States VS China Military & Defense AI Data Labeling Revenue Comparison, (2021 & 2025 & 2032) & (USD Million)
- Table 19. United States VS China Military & Defense AI Data Labeling Consumption Value Comparison, (2021 & 2025 & 2032) & (USD Million)
- Table 20. United States Based Military & Defense AI Data Labeling Companies, Headquarters (States, Country)

Table 21. United States Based Companies Military & Defense AI Data Labeling Revenue, (2021-2026) & (USD Million)

Table 22. United States Based Companies Military & Defense AI Data Labeling Revenue Market Share (2021-2026)

Table 23. China Based Military & Defense AI Data Labeling Companies, Headquarters (Province, Country)

Table 24. China Based Companies Military & Defense AI Data Labeling Revenue, (2021-2026) & (USD Million)

Table 25. China Based Companies Military & Defense AI Data Labeling Revenue Market Share (2021-2026)

Table 26. Rest of World Based Military & Defense AI Data Labeling Companies, Headquarters (Province, Country)

Table 27. Rest of World Based Companies Military & Defense AI Data Labeling Revenue (2021-2026) & (USD Million)

Table 28. Rest of World Based Companies Military & Defense AI Data Labeling Revenue Market Share (2021-2026)

Table 29. World Military & Defense AI Data Labeling Market Size by Type, (USD Million), 2021 & 2025 & 2032

Table 30. World Military & Defense AI Data Labeling Market Size Value by Type (2021-2026) & (USD Million)

Table 31. World Military & Defense AI Data Labeling Market Size by Type (2027-2032) & (USD Million)

Table 32. World Military & Defense AI Data Labeling Market Size by Modality, (USD Million), 2021 & 2025 & 2032

Table 33. World Military & Defense AI Data Labeling Market Size Value by Modality (2021-2026) & (USD Million)

Table 34. World Military & Defense AI Data Labeling Market Size by Modality (2027-2032) & (USD Million)

Table 35. World Military & Defense AI Data Labeling Market Size by Application, (USD Million), 2021 & 2025 & 2032

Table 36. World Military & Defense AI Data Labeling Market Size by Application (2021-2026) & (USD Million)

Table 37. World Military & Defense AI Data Labeling Market Size by Application (2027-2032) & (USD Million)

Table 38. Scale AI Basic Information, Manufacturing Base and Competitors

Table 39. Scale AI Major Business

Table 40. Scale AI Military & Defense AI Data Labeling Product and Services

Table 41. Scale AI Military & Defense AI Data Labeling Revenue, Gross Margin and Market Share (2021-2026) & (USD Million)

- Table 42. Scale AI Recent Developments/Updates
- Table 43. Scale AI Competitive Strengths & Weaknesses
- Table 44. Labelbox Basic Information, Manufacturing Base and Competitors
- Table 45. Labelbox Major Business
- Table 46. Labelbox Military & Defense AI Data Labeling Product and Services
- Table 47. Labelbox Military & Defense AI Data Labeling Revenue, Gross Margin and Market Share (2021-2026) & (USD Million)
- Table 48. Labelbox Recent Developments/Updates
- Table 49. Labelbox Competitive Strengths & Weaknesses
- Table 50. Appen Basic Information, Manufacturing Base and Competitors
- Table 51. Appen Major Business
- Table 52. Appen Military & Defense AI Data Labeling Product and Services
- Table 53. Appen Military & Defense AI Data Labeling Revenue, Gross Margin and Market Share (2021-2026) & (USD Million)
- Table 54. Appen Recent Developments/Updates
- Table 55. Appen Competitive Strengths & Weaknesses
- Table 56. TELUS International AI Basic Information, Manufacturing Base and Competitors
- Table 57. TELUS International AI Major Business
- Table 58. TELUS International AI Military & Defense AI Data Labeling Product and Services
- Table 59. TELUS International AI Military & Defense AI Data Labeling Revenue, Gross Margin and Market Share (2021-2026) & (USD Million)
- Table 60. TELUS International AI Recent Developments/Updates
- Table 61. TELUS International AI Competitive Strengths & Weaknesses
- Table 62. Surge AI Basic Information, Manufacturing Base and Competitors
- Table 63. Surge AI Major Business
- Table 64. Surge AI Military & Defense AI Data Labeling Product and Services
- Table 65. Surge AI Military & Defense AI Data Labeling Revenue, Gross Margin and Market Share (2021-2026) & (USD Million)
- Table 66. Surge AI Recent Developments/Updates
- Table 67. Surge AI Competitive Strengths & Weaknesses
- Table 68. Palantir Basic Information, Manufacturing Base and Competitors
- Table 69. Palantir Major Business
- Table 70. Palantir Military & Defense AI Data Labeling Product and Services
- Table 71. Palantir Military & Defense AI Data Labeling Revenue, Gross Margin and Market Share (2021-2026) & (USD Million)
- Table 72. Palantir Recent Developments/Updates
- Table 73. Palantir Competitive Strengths & Weaknesses

- Table 74. Shield AI Basic Information, Manufacturing Base and Competitors
- Table 75. Shield AI Major Business
- Table 76. Shield AI Military & Defense AI Data Labeling Product and Services
- Table 77. Shield AI Military & Defense AI Data Labeling Revenue, Gross Margin and Market Share (2021-2026) & (USD Million)
- Table 78. Shield AI Recent Developments/Updates
- Table 79. Shield AI Competitive Strengths & Weaknesses
- Table 80. Kili Technology Basic Information, Manufacturing Base and Competitors
- Table 81. Kili Technology Major Business
- Table 82. Kili Technology Military & Defense AI Data Labeling Product and Services
- Table 83. Kili Technology Military & Defense AI Data Labeling Revenue, Gross Margin and Market Share (2021-2026) & (USD Million)
- Table 84. Kili Technology Recent Developments/Updates
- Table 85. Kili Technology Competitive Strengths & Weaknesses
- Table 86. Latent AI Basic Information, Manufacturing Base and Competitors
- Table 87. Latent AI Major Business
- Table 88. Latent AI Military & Defense AI Data Labeling Product and Services
- Table 89. Latent AI Military & Defense AI Data Labeling Revenue, Gross Margin and Market Share (2021-2026) & (USD Million)
- Table 90. Latent AI Recent Developments/Updates
- Table 91. Latent AI Competitive Strengths & Weaknesses
- Table 92. iMerit Basic Information, Manufacturing Base and Competitors
- Table 93. iMerit Major Business
- Table 94. iMerit Military & Defense AI Data Labeling Product and Services
- Table 95. iMerit Military & Defense AI Data Labeling Revenue, Gross Margin and Market Share (2021-2026) & (USD Million)
- Table 96. iMerit Recent Developments/Updates
- Table 97. iMerit Competitive Strengths & Weaknesses
- Table 98. CloudFactory Basic Information, Manufacturing Base and Competitors
- Table 99. CloudFactory Major Business
- Table 100. CloudFactory Military & Defense AI Data Labeling Product and Services
- Table 101. CloudFactory Military & Defense AI Data Labeling Revenue, Gross Margin and Market Share (2021-2026) & (USD Million)
- Table 102. CloudFactory Recent Developments/Updates
- Table 103. CloudFactory Competitive Strengths & Weaknesses
- Table 104. Cogito Tech Basic Information, Manufacturing Base and Competitors
- Table 105. Cogito Tech Major Business
- Table 106. Cogito Tech Military & Defense AI Data Labeling Product and Services
- Table 107. Cogito Tech Military & Defense AI Data Labeling Revenue, Gross Margin

and Market Share (2021-2026) & (USD Million)

Table 108. Cogito Tech Recent Developments/Updates

Table 109. Cogito Tech Competitive Strengths & Weaknesses

Table 110. SuperAnnotate Basic Information, Manufacturing Base and Competitors

Table 111. SuperAnnotate Major Business

Table 112. SuperAnnotate Military & Defense AI Data Labeling Product and Services

Table 113. SuperAnnotate Military & Defense AI Data Labeling Revenue, Gross Margin and Market Share (2021-2026) & (USD Million)

Table 114. SuperAnnotate Recent Developments/Updates

Table 115. SuperAnnotate Competitive Strengths & Weaknesses

Table 116. Spear AI Basic Information, Manufacturing Base and Competitors

Table 117. Spear AI Major Business

Table 118. Spear AI Military & Defense AI Data Labeling Product and Services

Table 119. Spear AI Military & Defense AI Data Labeling Revenue, Gross Margin and Market Share (2021-2026) & (USD Million)

Table 120. Spear AI Recent Developments/Updates

Table 121. Spear AI Competitive Strengths & Weaknesses

Table 122. 4Paradigm Basic Information, Manufacturing Base and Competitors

Table 123. 4Paradigm Major Business

Table 124. 4Paradigm Military & Defense AI Data Labeling Product and Services

Table 125. 4Paradigm Military & Defense AI Data Labeling Revenue, Gross Margin and Market Share (2021-2026) & (USD Million)

Table 126. 4Paradigm Recent Developments/Updates

Table 127. 4Paradigm Competitive Strengths & Weaknesses

Table 128. Synyi AI Basic Information, Manufacturing Base and Competitors

Table 129. Synyi AI Major Business

Table 130. Synyi AI Military & Defense AI Data Labeling Product and Services

Table 131. Synyi AI Military & Defense AI Data Labeling Revenue, Gross Margin and Market Share (2021-2026) & (USD Million)

Table 132. Synyi AI Recent Developments/Updates

Table 133. Synyi AI Competitive Strengths & Weaknesses

Table 134. ZhiHuishenZhou Basic Information, Manufacturing Base and Competitors

Table 135. ZhiHuishenZhou Major Business

Table 136. ZhiHuishenZhou Military & Defense AI Data Labeling Product and Services

Table 137. ZhiHuishenZhou Military & Defense AI Data Labeling Revenue, Gross Margin and Market Share (2021-2026) & (USD Million)

Table 138. ZhiHuishenZhou Recent Developments/Updates

Table 139. ZhiHuishenZhou Competitive Strengths & Weaknesses

Table 140. Yitu Technology Basic Information, Manufacturing Base and Competitors

- Table 141. Yitu Technology Major Business
- Table 142. Yitu Technology Military & Defense AI Data Labeling Product and Services
- Table 143. Yitu Technology Military & Defense AI Data Labeling Revenue, Gross Margin and Market Share (2021-2026) & (USD Million)
- Table 144. Yitu Technology Recent Developments/Updates
- Table 145. Yitu Technology Competitive Strengths & Weaknesses
- Table 146. Megvii Basic Information, Manufacturing Base and Competitors
- Table 147. Megvii Major Business
- Table 148. Megvii Military & Defense AI Data Labeling Product and Services
- Table 149. Megvii Military & Defense AI Data Labeling Revenue, Gross Margin and Market Share (2021-2026) & (USD Million)
- Table 150. Megvii Recent Developments/Updates
- Table 151. Megvii Competitive Strengths & Weaknesses
- Table 152. CloudWalk Basic Information, Manufacturing Base and Competitors
- Table 153. CloudWalk Major Business
- Table 154. CloudWalk Military & Defense AI Data Labeling Product and Services
- Table 155. CloudWalk Military & Defense AI Data Labeling Revenue, Gross Margin and Market Share (2021-2026) & (USD Million)
- Table 156. CloudWalk Recent Developments/Updates
- Table 157. CloudWalk Competitive Strengths & Weaknesses
- Table 158. CETC Basic Information, Manufacturing Base and Competitors
- Table 159. CETC Major Business
- Table 160. CETC Military & Defense AI Data Labeling Product and Services
- Table 161. CETC Military & Defense AI Data Labeling Revenue, Gross Margin and Market Share (2021-2026) & (USD Million)
- Table 162. CETC Recent Developments/Updates
- Table 163. CETC Competitive Strengths & Weaknesses
- Table 164. CASIC Basic Information, Manufacturing Base and Competitors
- Table 165. CASIC Major Business
- Table 166. CASIC Military & Defense AI Data Labeling Product and Services
- Table 167. CASIC Military & Defense AI Data Labeling Revenue, Gross Margin and Market Share (2021-2026) & (USD Million)
- Table 168. CASIC Recent Developments/Updates
- Table 169. CASIC Competitive Strengths & Weaknesses
- Table 170. Global Key Players of Military & Defense AI Data Labeling Upstream (Raw Materials)
- Table 171. Global Military & Defense AI Data Labeling Typical Customers

List Of Figures

LIST OF FIGURES

- Figure 1. Military & Defense AI Data Labeling Picture
- Figure 2. World Military & Defense AI Data Labeling Total Revenue: 2021 & 2025 & 2032, (USD Million)
- Figure 3. World Military & Defense AI Data Labeling Total Revenue (2021-2032) & (USD Million)
- Figure 4. World Military & Defense AI Data Labeling Revenue by Region (2021, 2025 and 2032) & (USD Million), (by Headquarter Location)
- Figure 5. World Military & Defense AI Data Labeling Revenue Market Share by Region (2021-2032), (by Headquarter Location)
- Figure 6. United States Based Company Military & Defense AI Data Labeling Revenue (2021-2032) & (USD Million)
- Figure 7. China Based Company Military & Defense AI Data Labeling Revenue (2021-2032) & (USD Million)
- Figure 8. Europe Based Company Military & Defense AI Data Labeling Revenue (2021-2032) & (USD Million)
- Figure 9. Japan Based Company Military & Defense AI Data Labeling Revenue (2021-2032) & (USD Million)
- Figure 10. South Korea Based Company Military & Defense AI Data Labeling Revenue (2021-2032) & (USD Million)
- Figure 11. ASEAN Based Company Military & Defense AI Data Labeling Revenue (2021-2032) & (USD Million)
- Figure 12. India Based Company Military & Defense AI Data Labeling Revenue (2021-2032) & (USD Million)
- Figure 13. Military & Defense AI Data Labeling Market Drivers
- Figure 14. Factors Affecting Demand
- Figure 15. World Military & Defense AI Data Labeling Consumption Value (2021-2032) & (USD Million)
- Figure 16. World Military & Defense AI Data Labeling Consumption Value Market Share by Region (2021-2032)
- Figure 17. United States Military & Defense AI Data Labeling Consumption Value (2021-2032) & (USD Million)
- Figure 18. China Military & Defense AI Data Labeling Consumption Value (2021-2032) & (USD Million)
- Figure 19. Europe Military & Defense AI Data Labeling Consumption Value (2021-2032) & (USD Million)

- Figure 20. Japan Military & Defense AI Data Labeling Consumption Value (2021-2032) & (USD Million)
- Figure 21. South Korea Military & Defense AI Data Labeling Consumption Value (2021-2032) & (USD Million)
- Figure 22. ASEAN Military & Defense AI Data Labeling Consumption Value (2021-2032) & (USD Million)
- Figure 23. India Military & Defense AI Data Labeling Consumption Value (2021-2032) & (USD Million)
- Figure 24. Producer Shipments of Military & Defense AI Data Labeling by Player Revenue (\$MM) and Market Share (%): 2025
- Figure 25. Global Four-firm Concentration Ratios (CR4) for Military & Defense AI Data Labeling Markets in 2025
- Figure 26. Global Four-firm Concentration Ratios (CR8) for Military & Defense AI Data Labeling Markets in 2025
- Figure 27. United States VS China: Military & Defense AI Data Labeling Revenue Market Share Comparison (2021 & 2025 & 2032)
- Figure 28. United States VS China: Military & Defense AI Data Labeling Consumption Value Market Share Comparison (2021 & 2025 & 2032)
- Figure 29. World Military & Defense AI Data Labeling Market Size by Type, (USD Million), 2021 & 2025 & 2032
- Figure 30. World Military & Defense AI Data Labeling Market Size Market Share by Type in 2025
- Figure 31. Object Detection & Tracking
- Figure 32. Semantic Segmentation
- Figure 33. Change Detection
- Figure 34. Signal Classification
- Figure 35. Entity Recognition
- Figure 36. Sensor Fusion Alignment
- Figure 37. World Military & Defense AI Data Labeling Market Size Market Share by Type (2021-2032)
- Figure 38. World Military & Defense AI Data Labeling Market Size by Modality, (USD Million), 2021 & 2025 & 2032
- Figure 39. World Military & Defense AI Data Labeling Market Size Market Share by Modality in 2025
- Figure 40. Image & Video Annotation
- Figure 41. Geospatial & Satellite Annotation
- Figure 42. Radar & RF Signal Annotation
- Figure 43. LiDAR & 3D Point Cloud Annotation
- Figure 44. Audio & Acoustic Annotation

Figure 45. Text & Intelligence Annotation

Figure 46. Multimodal Fusion Annotation

Figure 47. Multimodal Fusion Annotation

Figure 48. World Military & Defense AI Data Labeling Market Size Market Share by Modality (2021-2032)

Figure 49. World Military & Defense AI Data Labeling Market Size by Application, (USD Million), 2021 & 2025 & 2032

Figure 50. World Military & Defense AI Data Labeling Market Size Market Share by Application in 2025

Figure 51. Intelligence, Surveillance & Reconnaissance (ISR)

Figure 52. Autonomous Systems

Figure 53. Electronic Warfare & Signal Intelligence

Figure 54. Battlefield Situational Awareness

Figure 55. Military Mapping & Navigation

Figure 56. World Military & Defense AI Data Labeling Market Size Market Share by Application (2021-2032)

Figure 57. Military & Defense AI Data Labeling Industrial Chain

Figure 58. Methodology

Figure 59. Research Process and Data Source

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