

# Global Military & Defense AI Data Labeling Market 2026 by Company, Regions, Type and Application, Forecast to 2032

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## Abstracts

According to our (Global Info Research) latest study, the global Military & Defense AI Data Labeling market size was valued at US\$ 2871 million in 2025 and is forecast to a readjusted size of US\$ 30264 million by 2032 with a CAGR of 40.0% during review period.

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 is a detailed and comprehensive analysis for global Military & Defense AI Data Labeling market. Both quantitative and qualitative analyses are presented by company, by region & country, by Type and by Application. As the market is constantly changing, this report explores the competition, supply and demand trends, as well as key factors that contribute to its changing demands across many markets. Company profiles and product examples of selected competitors, along with market share estimates of some of the selected leaders for the year 2025, are provided.

#### Key Features:

Global Military & Defense AI Data Labeling market size and forecasts, in consumption value (\$ Million), 2021-2032

Global Military & Defense AI Data Labeling market size and forecasts by region and country, in consumption value (\$ Million), 2021-2032

Global Military & Defense AI Data Labeling market size and forecasts, by Type and by Application, in consumption value (\$ Million), 2021-2032

Global Military & Defense AI Data Labeling market shares of main players, in revenue (\$ Million), 2021-2026

#### The Primary Objectives in This Report Are:

To determine the size of the total market opportunity of global and key countries

To assess the growth potential for Military & Defense AI Data Labeling

To forecast future growth in each product and end-use market

To assess competitive factors affecting the marketplace

This report profiles key 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.

### Market segmentation

Military & Defense AI Data Labeling market is split by Type and by Application. For the period 2021-2032, the growth among segments provides accurate calculations and forecasts for Consumption Value by Type and by Application. This analysis can help you expand your business by targeting qualified niche markets.

### Market segment by Type

Object Detection & Tracking

Semantic Segmentation

Change Detection

Signal Classification

Entity Recognition

Sensor Fusion Alignment

### Market segment 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

Market segment by Application

Intelligence, Surveillance & Reconnaissance (ISR)

Autonomous Systems

Electronic Warfare & Signal Intelligence

Battlefield Situational Awareness

Military Mapping & Navigation

Market segment by players, this report covers

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

Market segment by regions, regional analysis covers

North America (United States, Canada and Mexico)

Europe (Germany, France, UK, Russia, Italy and Rest of Europe)

Asia-Pacific (China, Japan, South Korea, India, Southeast Asia and Rest of Asia-Pacific)

South America (Brazil, Rest of South America)

Middle East & Africa (Turkey, Saudi Arabia, UAE, Rest of Middle East & Africa)

The content of the study subjects, includes a total of 13 chapters:

Chapter 1, to describe Military & Defense AI Data Labeling product scope, market overview, market estimation caveats and base year.

Chapter 2, to profile the top players of Military & Defense AI Data Labeling, with revenue, gross margin, and global market share of Military & Defense AI Data Labeling from 2021 to 2026.

Chapter 3, the Military & Defense AI Data Labeling competitive situation, revenue, and global market share of top players are analyzed emphatically by landscape contrast.

Chapter 4 and 5, to segment the market size by Type and by Application, with consumption value and growth rate by Type, by Application, from 2021 to 2032.

Chapter 6, 7, 8, 9, and 10, to break the market size data at the country level, with revenue and market share for key countries in the world, from 2021 to 2026. and Military & Defense AI Data Labeling market forecast, by regions, by Type and by Application, with consumption value, from 2027 to 2032.

Chapter 11, market dynamics, drivers, restraints, trends, Porters Five Forces analysis.

Chapter 12, the key raw materials and key suppliers, and industry chain of Military & Defense AI Data Labeling.

Chapter 13, to describe Military & Defense AI Data Labeling research findings and conclusion.

## Contents

### 1 MARKET OVERVIEW

1.1 Product Overview and Scope

1.2 Market Estimation Caveats and Base Year

1.3 Classification of Military & Defense AI Data Labeling by Type

1.3.1 Overview: Global Military & Defense AI Data Labeling Market Size by Type: 2021 Versus 2025 Versus 2032

1.3.2 Global Military & Defense AI Data Labeling Consumption Value Market Share by Type in 2025

1.3.3 Object Detection & Tracking

1.3.4 Semantic Segmentation

1.3.5 Change Detection

1.3.6 Signal Classification

1.3.7 Entity Recognition

1.3.8 Sensor Fusion Alignment

1.4 Classification of Military & Defense AI Data Labeling by Modality

1.4.1 Overview: Global Military & Defense AI Data Labeling Market Size by Modality: 2021 Versus 2025 Versus 2032

1.4.2 Global Military & Defense AI Data Labeling Consumption Value Market Share by Modality in 2025

1.4.3 Image & Video Annotation

1.4.4 Geospatial & Satellite Annotation

1.4.5 Radar & RF Signal Annotation

1.4.6 LiDAR & 3D Point Cloud Annotation

1.4.7 Audio & Acoustic Annotation

1.4.8 Text & Intelligence Annotation

1.4.9 Multimodal Fusion Annotation

1.5 Global Military & Defense AI Data Labeling Market by Application

1.5.1 Overview: Global Military & Defense AI Data Labeling Market Size by Application: 2021 Versus 2025 Versus 2032

1.5.2 Intelligence, Surveillance & Reconnaissance (ISR)

1.5.3 Autonomous Systems

1.5.4 Electronic Warfare & Signal Intelligence

1.5.5 Battlefield Situational Awareness

1.5.6 Military Mapping & Navigation

1.6 Global Military & Defense AI Data Labeling Market Size & Forecast

1.7 Global Military & Defense AI Data Labeling Market Size and Forecast by Region

1.7.1 Global Military & Defense AI Data Labeling Market Size by Region: 2021 VS 2025 VS 2032

1.7.2 Global Military & Defense AI Data Labeling Market Size by Region, (2021-2032)

1.7.3 North America Military & Defense AI Data Labeling Market Size and Prospect (2021-2032)

1.7.4 Europe Military & Defense AI Data Labeling Market Size and Prospect (2021-2032)

1.7.5 Asia-Pacific Military & Defense AI Data Labeling Market Size and Prospect (2021-2032)

1.7.6 South America Military & Defense AI Data Labeling Market Size and Prospect (2021-2032)

1.7.7 Middle East & Africa Military & Defense AI Data Labeling Market Size and Prospect (2021-2032)

## **2 COMPANY PROFILES**

### 2.1 Scale AI

2.1.1 Scale AI Details

2.1.2 Scale AI Major Business

2.1.3 Scale AI Military & Defense AI Data Labeling Product and Solutions

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

2.1.5 Scale AI Recent Developments and Future Plans

### 2.2 Labelbox

2.2.1 Labelbox Details

2.2.2 Labelbox Major Business

2.2.3 Labelbox Military & Defense AI Data Labeling Product and Solutions

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

2.2.5 Labelbox Recent Developments and Future Plans

### 2.3 Appen

2.3.1 Appen Details

2.3.2 Appen Major Business

2.3.3 Appen Military & Defense AI Data Labeling Product and Solutions

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

2.3.5 Appen Recent Developments and Future Plans

### 2.4 TELUS International AI

2.4.1 TELUS International AI Details

2.4.2 TELUS International AI Major Business

2.4.3 TELUS International AI Military & Defense AI Data Labeling Product and Solutions

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

2.4.5 TELUS International AI Recent Developments and Future Plans

2.5 Surge AI

2.5.1 Surge AI Details

2.5.2 Surge AI Major Business

2.5.3 Surge AI Military & Defense AI Data Labeling Product and Solutions

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

2.5.5 Surge AI Recent Developments and Future Plans

2.6 Palantir

2.6.1 Palantir Details

2.6.2 Palantir Major Business

2.6.3 Palantir Military & Defense AI Data Labeling Product and Solutions

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

2.6.5 Palantir Recent Developments and Future Plans

2.7 Shield AI

2.7.1 Shield AI Details

2.7.2 Shield AI Major Business

2.7.3 Shield AI Military & Defense AI Data Labeling Product and Solutions

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

2.7.5 Shield AI Recent Developments and Future Plans

2.8 Kili Technology

2.8.1 Kili Technology Details

2.8.2 Kili Technology Major Business

2.8.3 Kili Technology Military & Defense AI Data Labeling Product and Solutions

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

2.8.5 Kili Technology Recent Developments and Future Plans

2.9 Latent AI

2.9.1 Latent AI Details

2.9.2 Latent AI Major Business

2.9.3 Latent AI Military & Defense AI Data Labeling Product and Solutions

2.9.4 Latent AI Military & Defense AI Data Labeling Revenue, Gross Margin and

## Market Share (2021-2026)

### 2.9.5 Latent AI Recent Developments and Future Plans

## 2.10 iMerit

### 2.10.1 iMerit Details

### 2.10.2 iMerit Major Business

### 2.10.3 iMerit Military & Defense AI Data Labeling Product and Solutions

### 2.10.4 iMerit Military & Defense AI Data Labeling Revenue, Gross Margin and Market Share (2021-2026)

### 2.10.5 iMerit Recent Developments and Future Plans

## 2.11 CloudFactory

### 2.11.1 CloudFactory Details

### 2.11.2 CloudFactory Major Business

### 2.11.3 CloudFactory Military & Defense AI Data Labeling Product and Solutions

### 2.11.4 CloudFactory Military & Defense AI Data Labeling Revenue, Gross Margin and Market Share (2021-2026)

### 2.11.5 CloudFactory Recent Developments and Future Plans

## 2.12 Cogito Tech

### 2.12.1 Cogito Tech Details

### 2.12.2 Cogito Tech Major Business

### 2.12.3 Cogito Tech Military & Defense AI Data Labeling Product and Solutions

### 2.12.4 Cogito Tech Military & Defense AI Data Labeling Revenue, Gross Margin and Market Share (2021-2026)

### 2.12.5 Cogito Tech Recent Developments and Future Plans

## 2.13 SuperAnnotate

### 2.13.1 SuperAnnotate Details

### 2.13.2 SuperAnnotate Major Business

### 2.13.3 SuperAnnotate Military & Defense AI Data Labeling Product and Solutions

### 2.13.4 SuperAnnotate Military & Defense AI Data Labeling Revenue, Gross Margin and Market Share (2021-2026)

### 2.13.5 SuperAnnotate Recent Developments and Future Plans

## 2.14 Spear AI

### 2.14.1 Spear AI Details

### 2.14.2 Spear AI Major Business

### 2.14.3 Spear AI Military & Defense AI Data Labeling Product and Solutions

### 2.14.4 Spear AI Military & Defense AI Data Labeling Revenue, Gross Margin and Market Share (2021-2026)

### 2.14.5 Spear AI Recent Developments and Future Plans

## 2.15 4Paradigm

### 2.15.1 4Paradigm Details

- 2.15.2 4Paradigm Major Business
- 2.15.3 4Paradigm Military & Defense AI Data Labeling Product and Solutions
- 2.15.4 4Paradigm Military & Defense AI Data Labeling Revenue, Gross Margin and Market Share (2021-2026)
- 2.15.5 4Paradigm Recent Developments and Future Plans
- 2.16 Synyi AI
  - 2.16.1 Synyi AI Details
  - 2.16.2 Synyi AI Major Business
  - 2.16.3 Synyi AI Military & Defense AI Data Labeling Product and Solutions
  - 2.16.4 Synyi AI Military & Defense AI Data Labeling Revenue, Gross Margin and Market Share (2021-2026)
  - 2.16.5 Synyi AI Recent Developments and Future Plans
- 2.17 ZhiHuishenZhou
  - 2.17.1 ZhiHuishenZhou Details
  - 2.17.2 ZhiHuishenZhou Major Business
  - 2.17.3 ZhiHuishenZhou Military & Defense AI Data Labeling Product and Solutions
  - 2.17.4 ZhiHuishenZhou Military & Defense AI Data Labeling Revenue, Gross Margin and Market Share (2021-2026)
  - 2.17.5 ZhiHuishenZhou Recent Developments and Future Plans
- 2.18 Yitu Technology
  - 2.18.1 Yitu Technology Details
  - 2.18.2 Yitu Technology Major Business
  - 2.18.3 Yitu Technology Military & Defense AI Data Labeling Product and Solutions
  - 2.18.4 Yitu Technology Military & Defense AI Data Labeling Revenue, Gross Margin and Market Share (2021-2026)
  - 2.18.5 Yitu Technology Recent Developments and Future Plans
- 2.19 Megvii
  - 2.19.1 Megvii Details
  - 2.19.2 Megvii Major Business
  - 2.19.3 Megvii Military & Defense AI Data Labeling Product and Solutions
  - 2.19.4 Megvii Military & Defense AI Data Labeling Revenue, Gross Margin and Market Share (2021-2026)
  - 2.19.5 Megvii Recent Developments and Future Plans
- 2.20 CloudWalk
  - 2.20.1 CloudWalk Details
  - 2.20.2 CloudWalk Major Business
  - 2.20.3 CloudWalk Military & Defense AI Data Labeling Product and Solutions
  - 2.20.4 CloudWalk Military & Defense AI Data Labeling Revenue, Gross Margin and Market Share (2021-2026)

2.20.5 CloudWalk Recent Developments and Future Plans

## 2.21 CETC

2.21.1 CETC Details

2.21.2 CETC Major Business

2.21.3 CETC Military & Defense AI Data Labeling Product and Solutions

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

2.21.5 CETC Recent Developments and Future Plans

## 2.22 CASIC

2.22.1 CASIC Details

2.22.2 CASIC Major Business

2.22.3 CASIC Military & Defense AI Data Labeling Product and Solutions

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

2.22.5 CASIC Recent Developments and Future Plans

## 3 MARKET COMPETITION, BY PLAYERS

3.1 Global Military & Defense AI Data Labeling Revenue and Share by Players (2021-2026)

3.2 Market Share Analysis (2025)

3.2.1 Market Share of Military & Defense AI Data Labeling by Company Revenue

3.2.2 Top 3 Military & Defense AI Data Labeling Players Market Share in 2025

3.2.3 Top 6 Military & Defense AI Data Labeling Players Market Share in 2025

3.3 Military & Defense AI Data Labeling Market: Overall Company Footprint Analysis

3.3.1 Military & Defense AI Data Labeling Market: Region Footprint

3.3.2 Military & Defense AI Data Labeling Market: Company Product Type Footprint

3.3.3 Military & Defense AI Data Labeling Market: Company Product Application Footprint

3.4 New Market Entrants and Barriers to Market Entry

3.5 Mergers, Acquisition, Agreements, and Collaborations

## 4 MARKET SIZE SEGMENT BY TYPE

4.1 Global Military & Defense AI Data Labeling Consumption Value and Market Share by Type (2021-2026)

4.2 Global Military & Defense AI Data Labeling Market Forecast by Type (2027-2032)

## 5 MARKET SIZE SEGMENT BY APPLICATION

5.1 Global Military & Defense AI Data Labeling Consumption Value Market Share by Application (2021-2026)

5.2 Global Military & Defense AI Data Labeling Market Forecast by Application (2027-2032)

## **6 NORTH AMERICA**

6.1 North America Military & Defense AI Data Labeling Consumption Value by Type (2021-2032)

6.2 North America Military & Defense AI Data Labeling Market Size by Application (2021-2032)

6.3 North America Military & Defense AI Data Labeling Market Size by Country

6.3.1 North America Military & Defense AI Data Labeling Consumption Value by Country (2021-2032)

6.3.2 United States Military & Defense AI Data Labeling Market Size and Forecast (2021-2032)

6.3.3 Canada Military & Defense AI Data Labeling Market Size and Forecast (2021-2032)

6.3.4 Mexico Military & Defense AI Data Labeling Market Size and Forecast (2021-2032)

## **7 EUROPE**

7.1 Europe Military & Defense AI Data Labeling Consumption Value by Type (2021-2032)

7.2 Europe Military & Defense AI Data Labeling Consumption Value by Application (2021-2032)

7.3 Europe Military & Defense AI Data Labeling Market Size by Country

7.3.1 Europe Military & Defense AI Data Labeling Consumption Value by Country (2021-2032)

7.3.2 Germany Military & Defense AI Data Labeling Market Size and Forecast (2021-2032)

7.3.3 France Military & Defense AI Data Labeling Market Size and Forecast (2021-2032)

7.3.4 United Kingdom Military & Defense AI Data Labeling Market Size and Forecast (2021-2032)

7.3.5 Russia Military & Defense AI Data Labeling Market Size and Forecast (2021-2032)

### 7.3.6 Italy Military & Defense AI Data Labeling Market Size and Forecast (2021-2032)

## **8 ASIA-PACIFIC**

### 8.1 Asia-Pacific Military & Defense AI Data Labeling Consumption Value by Type (2021-2032)

### 8.2 Asia-Pacific Military & Defense AI Data Labeling Consumption Value by Application (2021-2032)

### 8.3 Asia-Pacific Military & Defense AI Data Labeling Market Size by Region

#### 8.3.1 Asia-Pacific Military & Defense AI Data Labeling Consumption Value by Region (2021-2032)

#### 8.3.2 China Military & Defense AI Data Labeling Market Size and Forecast (2021-2032)

#### 8.3.3 Japan Military & Defense AI Data Labeling Market Size and Forecast (2021-2032)

#### 8.3.4 South Korea Military & Defense AI Data Labeling Market Size and Forecast (2021-2032)

#### 8.3.5 India Military & Defense AI Data Labeling Market Size and Forecast (2021-2032)

#### 8.3.6 Southeast Asia Military & Defense AI Data Labeling Market Size and Forecast (2021-2032)

#### 8.3.7 Australia Military & Defense AI Data Labeling Market Size and Forecast (2021-2032)

## **9 SOUTH AMERICA**

### 9.1 South America Military & Defense AI Data Labeling Consumption Value by Type (2021-2032)

### 9.2 South America Military & Defense AI Data Labeling Consumption Value by Application (2021-2032)

### 9.3 South America Military & Defense AI Data Labeling Market Size by Country

#### 9.3.1 South America Military & Defense AI Data Labeling Consumption Value by Country (2021-2032)

#### 9.3.2 Brazil Military & Defense AI Data Labeling Market Size and Forecast (2021-2032)

#### 9.3.3 Argentina Military & Defense AI Data Labeling Market Size and Forecast (2021-2032)

## **10 MIDDLE EAST & AFRICA**

10.1 Middle East & Africa Military & Defense AI Data Labeling Consumption Value by Type (2021-2032)

10.2 Middle East & Africa Military & Defense AI Data Labeling Consumption Value by Application (2021-2032)

10.3 Middle East & Africa Military & Defense AI Data Labeling Market Size by Country

10.3.1 Middle East & Africa Military & Defense AI Data Labeling Consumption Value by Country (2021-2032)

10.3.2 Turkey Military & Defense AI Data Labeling Market Size and Forecast (2021-2032)

10.3.3 Saudi Arabia Military & Defense AI Data Labeling Market Size and Forecast (2021-2032)

10.3.4 UAE Military & Defense AI Data Labeling Market Size and Forecast (2021-2032)

## **11 MARKET DYNAMICS**

11.1 Military & Defense AI Data Labeling Market Drivers

11.2 Military & Defense AI Data Labeling Market Restraints

11.3 Military & Defense AI Data Labeling Trends Analysis

11.4 Porters Five Forces Analysis

11.4.1 Threat of New Entrants

11.4.2 Bargaining Power of Suppliers

11.4.3 Bargaining Power of Buyers

11.4.4 Threat of Substitutes

11.4.5 Competitive Rivalry

## **12 INDUSTRY CHAIN ANALYSIS**

12.1 Military & Defense AI Data Labeling Industry Chain

12.2 Military & Defense AI Data Labeling Upstream Analysis

12.3 Military & Defense AI Data Labeling Midstream Analysis

12.4 Military & Defense AI Data Labeling Downstream Analysis

## **13 RESEARCH FINDINGS AND CONCLUSION**

## **14 APPENDIX**

14.1 Methodology

14.2 Research Process and Data Source

## 14.3 Disclaimer

## List Of Tables

### LIST OF TABLES

Table 1. Global Military & Defense AI Data Labeling Consumption Value by Type, (USD Million), 2021 & 2025 & 2032

Table 2. Global Military & Defense AI Data Labeling Consumption Value by Modality, (USD Million), 2021 & 2025 & 2032

Table 3. Global Military & Defense AI Data Labeling Consumption Value by Application, (USD Million), 2021 & 2025 & 2032

Table 4. Global Military & Defense AI Data Labeling Consumption Value by Region (2021-2026) & (USD Million)

Table 5. Global Military & Defense AI Data Labeling Consumption Value by Region (2027-2032) & (USD Million)

Table 6. Scale AI Company Information, Head Office, and Major Competitors

Table 7. Scale AI Major Business

Table 8. Scale AI Military & Defense AI Data Labeling Product and Solutions

Table 9. Scale AI Military & Defense AI Data Labeling Revenue (USD Million), Gross Margin and Market Share (2021-2026)

Table 10. Scale AI Recent Developments and Future Plans

Table 11. Labelbox Company Information, Head Office, and Major Competitors

Table 12. Labelbox Major Business

Table 13. Labelbox Military & Defense AI Data Labeling Product and Solutions

Table 14. Labelbox Military & Defense AI Data Labeling Revenue (USD Million), Gross Margin and Market Share (2021-2026)

Table 15. Labelbox Recent Developments and Future Plans

Table 16. Appen Company Information, Head Office, and Major Competitors

Table 17. Appen Major Business

Table 18. Appen Military & Defense AI Data Labeling Product and Solutions

Table 19. Appen Military & Defense AI Data Labeling Revenue (USD Million), Gross Margin and Market Share (2021-2026)

Table 20. TELUS International AI Company Information, Head Office, and Major Competitors

Table 21. TELUS International AI Major Business

Table 22. TELUS International AI Military & Defense AI Data Labeling Product and Solutions

Table 23. TELUS International AI Military & Defense AI Data Labeling Revenue (USD Million), Gross Margin and Market Share (2021-2026)

Table 24. TELUS International AI Recent Developments and Future Plans

Table 25. Surge AI Company Information, Head Office, and Major Competitors

Table 26. Surge AI Major Business

Table 27. Surge AI Military & Defense AI Data Labeling Product and Solutions

Table 28. Surge AI Military & Defense AI Data Labeling Revenue (USD Million), Gross Margin and Market Share (2021-2026)

Table 29. Surge AI Recent Developments and Future Plans

Table 30. Palantir Company Information, Head Office, and Major Competitors

Table 31. Palantir Major Business

Table 32. Palantir Military & Defense AI Data Labeling Product and Solutions

Table 33. Palantir Military & Defense AI Data Labeling Revenue (USD Million), Gross Margin and Market Share (2021-2026)

Table 34. Palantir Recent Developments and Future Plans

Table 35. Shield AI Company Information, Head Office, and Major Competitors

Table 36. Shield AI Major Business

Table 37. Shield AI Military & Defense AI Data Labeling Product and Solutions

Table 38. Shield AI Military & Defense AI Data Labeling Revenue (USD Million), Gross Margin and Market Share (2021-2026)

Table 39. Shield AI Recent Developments and Future Plans

Table 40. Kili Technology Company Information, Head Office, and Major Competitors

Table 41. Kili Technology Major Business

Table 42. Kili Technology Military & Defense AI Data Labeling Product and Solutions

Table 43. Kili Technology Military & Defense AI Data Labeling Revenue (USD Million), Gross Margin and Market Share (2021-2026)

Table 44. Kili Technology Recent Developments and Future Plans

Table 45. Latent AI Company Information, Head Office, and Major Competitors

Table 46. Latent AI Major Business

Table 47. Latent AI Military & Defense AI Data Labeling Product and Solutions

Table 48. Latent AI Military & Defense AI Data Labeling Revenue (USD Million), Gross Margin and Market Share (2021-2026)

Table 49. Latent AI Recent Developments and Future Plans

Table 50. iMerit Company Information, Head Office, and Major Competitors

Table 51. iMerit Major Business

Table 52. iMerit Military & Defense AI Data Labeling Product and Solutions

Table 53. iMerit Military & Defense AI Data Labeling Revenue (USD Million), Gross Margin and Market Share (2021-2026)

Table 54. iMerit Recent Developments and Future Plans

Table 55. CloudFactory Company Information, Head Office, and Major Competitors

Table 56. CloudFactory Major Business

Table 57. CloudFactory Military & Defense AI Data Labeling Product and Solutions

Table 58. CloudFactory Military & Defense AI Data Labeling Revenue (USD Million), Gross Margin and Market Share (2021-2026)

Table 59. CloudFactory Recent Developments and Future Plans

Table 60. Cogito Tech Company Information, Head Office, and Major Competitors

Table 61. Cogito Tech Major Business

Table 62. Cogito Tech Military & Defense AI Data Labeling Product and Solutions

Table 63. Cogito Tech Military & Defense AI Data Labeling Revenue (USD Million), Gross Margin and Market Share (2021-2026)

Table 64. Cogito Tech Recent Developments and Future Plans

Table 65. SuperAnnotate Company Information, Head Office, and Major Competitors

Table 66. SuperAnnotate Major Business

Table 67. SuperAnnotate Military & Defense AI Data Labeling Product and Solutions

Table 68. SuperAnnotate Military & Defense AI Data Labeling Revenue (USD Million), Gross Margin and Market Share (2021-2026)

Table 69. SuperAnnotate Recent Developments and Future Plans

Table 70. Spear AI Company Information, Head Office, and Major Competitors

Table 71. Spear AI Major Business

Table 72. Spear AI Military & Defense AI Data Labeling Product and Solutions

Table 73. Spear AI Military & Defense AI Data Labeling Revenue (USD Million), Gross Margin and Market Share (2021-2026)

Table 74. Spear AI Recent Developments and Future Plans

Table 75. 4Paradigm Company Information, Head Office, and Major Competitors

Table 76. 4Paradigm Major Business

Table 77. 4Paradigm Military & Defense AI Data Labeling Product and Solutions

Table 78. 4Paradigm Military & Defense AI Data Labeling Revenue (USD Million), Gross Margin and Market Share (2021-2026)

Table 79. 4Paradigm Recent Developments and Future Plans

Table 80. Synyi AI Company Information, Head Office, and Major Competitors

Table 81. Synyi AI Major Business

Table 82. Synyi AI Military & Defense AI Data Labeling Product and Solutions

Table 83. Synyi AI Military & Defense AI Data Labeling Revenue (USD Million), Gross Margin and Market Share (2021-2026)

Table 84. Synyi AI Recent Developments and Future Plans

Table 85. ZhiHuishenZhou Company Information, Head Office, and Major Competitors

Table 86. ZhiHuishenZhou Major Business

Table 87. ZhiHuishenZhou Military & Defense AI Data Labeling Product and Solutions

Table 88. ZhiHuishenZhou Military & Defense AI Data Labeling Revenue (USD Million), Gross Margin and Market Share (2021-2026)

Table 89. ZhiHuishenZhou Recent Developments and Future Plans

Table 90. Yitu Technology Company Information, Head Office, and Major Competitors

Table 91. Yitu Technology Major Business

Table 92. Yitu Technology Military & Defense AI Data Labeling Product and Solutions

Table 93. Yitu Technology Military & Defense AI Data Labeling Revenue (USD Million), Gross Margin and Market Share (2021-2026)

Table 94. Yitu Technology Recent Developments and Future Plans

Table 95. Megvii Company Information, Head Office, and Major Competitors

Table 96. Megvii Major Business

Table 97. Megvii Military & Defense AI Data Labeling Product and Solutions

Table 98. Megvii Military & Defense AI Data Labeling Revenue (USD Million), Gross Margin and Market Share (2021-2026)

Table 99. Megvii Recent Developments and Future Plans

Table 100. CloudWalk Company Information, Head Office, and Major Competitors

Table 101. CloudWalk Major Business

Table 102. CloudWalk Military & Defense AI Data Labeling Product and Solutions

Table 103. CloudWalk Military & Defense AI Data Labeling Revenue (USD Million), Gross Margin and Market Share (2021-2026)

Table 104. CloudWalk Recent Developments and Future Plans

Table 105. CETC Company Information, Head Office, and Major Competitors

Table 106. CETC Major Business

Table 107. CETC Military & Defense AI Data Labeling Product and Solutions

Table 108. CETC Military & Defense AI Data Labeling Revenue (USD Million), Gross Margin and Market Share (2021-2026)

Table 109. CETC Recent Developments and Future Plans

Table 110. CASIC Company Information, Head Office, and Major Competitors

Table 111. CASIC Major Business

Table 112. CASIC Military & Defense AI Data Labeling Product and Solutions

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

Table 114. CASIC Recent Developments and Future Plans

Table 115. Global Military & Defense AI Data Labeling Revenue (USD Million) by Players (2021-2026)

Table 116. Global Military & Defense AI Data Labeling Revenue Share by Players (2021-2026)

Table 117. Breakdown of Military & Defense AI Data Labeling by Company Type (Tier 1, Tier 2, and Tier 3)

Table 118. Market Position of Players in Military & Defense AI Data Labeling, (Tier 1, Tier 2, and Tier 3), Based on Revenue in 2025

Table 119. Head Office of Key Military & Defense AI Data Labeling Players

Table 120. Military & Defense AI Data Labeling Market: Company Product Type Footprint

Table 121. Military & Defense AI Data Labeling Market: Company Product Application Footprint

Table 122. Military & Defense AI Data Labeling New Market Entrants and Barriers to Market Entry

Table 123. Military & Defense AI Data Labeling Mergers, Acquisition, Agreements, and Collaborations

Table 124. Global Military & Defense AI Data Labeling Consumption Value (USD Million) by Type (2021-2026)

Table 125. Global Military & Defense AI Data Labeling Consumption Value Share by Type (2021-2026)

Table 126. Global Military & Defense AI Data Labeling Consumption Value Forecast by Type (2027-2032)

Table 127. Global Military & Defense AI Data Labeling Consumption Value by Application (2021-2026)

Table 128. Global Military & Defense AI Data Labeling Consumption Value Forecast by Application (2027-2032)

Table 129. North America Military & Defense AI Data Labeling Consumption Value by Type (2021-2026) & (USD Million)

Table 130. North America Military & Defense AI Data Labeling Consumption Value by Type (2027-2032) & (USD Million)

Table 131. North America Military & Defense AI Data Labeling Consumption Value by Application (2021-2026) & (USD Million)

Table 132. North America Military & Defense AI Data Labeling Consumption Value by Application (2027-2032) & (USD Million)

Table 133. North America Military & Defense AI Data Labeling Consumption Value by Country (2021-2026) & (USD Million)

Table 134. North America Military & Defense AI Data Labeling Consumption Value by Country (2027-2032) & (USD Million)

Table 135. Europe Military & Defense AI Data Labeling Consumption Value by Type (2021-2026) & (USD Million)

Table 136. Europe Military & Defense AI Data Labeling Consumption Value by Type (2027-2032) & (USD Million)

Table 137. Europe Military & Defense AI Data Labeling Consumption Value by Application (2021-2026) & (USD Million)

Table 138. Europe Military & Defense AI Data Labeling Consumption Value by Application (2027-2032) & (USD Million)

Table 139. Europe Military & Defense AI Data Labeling Consumption Value by Country

(2021-2026) & (USD Million)

Table 140. Europe Military & Defense AI Data Labeling Consumption Value by Country (2027-2032) & (USD Million)

Table 141. Asia-Pacific Military & Defense AI Data Labeling Consumption Value by Type (2021-2026) & (USD Million)

Table 142. Asia-Pacific Military & Defense AI Data Labeling Consumption Value by Type (2027-2032) & (USD Million)

Table 143. Asia-Pacific Military & Defense AI Data Labeling Consumption Value by Application (2021-2026) & (USD Million)

Table 144. Asia-Pacific Military & Defense AI Data Labeling Consumption Value by Application (2027-2032) & (USD Million)

Table 145. Asia-Pacific Military & Defense AI Data Labeling Consumption Value by Region (2021-2026) & (USD Million)

Table 146. Asia-Pacific Military & Defense AI Data Labeling Consumption Value by Region (2027-2032) & (USD Million)

Table 147. South America Military & Defense AI Data Labeling Consumption Value by Type (2021-2026) & (USD Million)

Table 148. South America Military & Defense AI Data Labeling Consumption Value by Type (2027-2032) & (USD Million)

Table 149. South America Military & Defense AI Data Labeling Consumption Value by Application (2021-2026) & (USD Million)

Table 150. South America Military & Defense AI Data Labeling Consumption Value by Application (2027-2032) & (USD Million)

Table 151. South America Military & Defense AI Data Labeling Consumption Value by Country (2021-2026) & (USD Million)

Table 152. South America Military & Defense AI Data Labeling Consumption Value by Country (2027-2032) & (USD Million)

Table 153. Middle East & Africa Military & Defense AI Data Labeling Consumption Value by Type (2021-2026) & (USD Million)

Table 154. Middle East & Africa Military & Defense AI Data Labeling Consumption Value by Type (2027-2032) & (USD Million)

Table 155. Middle East & Africa Military & Defense AI Data Labeling Consumption Value by Application (2021-2026) & (USD Million)

Table 156. Middle East & Africa Military & Defense AI Data Labeling Consumption Value by Application (2027-2032) & (USD Million)

Table 157. Middle East & Africa Military & Defense AI Data Labeling Consumption Value by Country (2021-2026) & (USD Million)

Table 158. Middle East & Africa Military & Defense AI Data Labeling Consumption Value by Country (2027-2032) & (USD Million)

Table 159. Global Key Players of Military & Defense AI Data Labeling Upstream (Raw Materials)

Table 160. Global Military & Defense AI Data Labeling Typical Customers

## List Of Figures

### LIST OF FIGURES

- Figure 1. Military & Defense AI Data Labeling Picture
- Figure 2. Global Military & Defense AI Data Labeling Consumption Value by Type, (USD Million), 2021 & 2025 & 2032
- Figure 3. Global Military & Defense AI Data Labeling Consumption Value Market Share by Type in 2025
- Figure 4. Object Detection & Tracking
- Figure 5. Semantic Segmentation
- Figure 6. Change Detection
- Figure 7. Signal Classification
- Figure 8. Entity Recognition
- Figure 9. Sensor Fusion Alignment
- Figure 10. Global Military & Defense AI Data Labeling Consumption Value by Modality, (USD Million), 2021 & 2025 & 2032
- Figure 11. Global Military & Defense AI Data Labeling Consumption Value Market Share by Modality in 2025
- Figure 12. Image & Video Annotation
- Figure 13. Geospatial & Satellite Annotation
- Figure 14. Radar & RF Signal Annotation
- Figure 15. LiDAR & 3D Point Cloud Annotation
- Figure 16. Audio & Acoustic Annotation
- Figure 17. Text & Intelligence Annotation
- Figure 18. Multimodal Fusion Annotation
- Figure 19. Global Military & Defense AI Data Labeling Consumption Value by Application, (USD Million), 2021 & 2025 & 2032
- Figure 20. Military & Defense AI Data Labeling Consumption Value Market Share by Application in 2025
- Figure 21. Intelligence, Surveillance & Reconnaissance (ISR) Picture
- Figure 22. Autonomous Systems Picture
- Figure 23. Electronic Warfare & Signal Intelligence Picture
- Figure 24. Battlefield Situational Awareness Picture
- Figure 25. Military Mapping & Navigation Picture
- Figure 26. Global Military & Defense AI Data Labeling Consumption Value, (USD Million): 2021 & 2025 & 2032
- Figure 27. Global Military & Defense AI Data Labeling Consumption Value and Forecast (2021-2032) & (USD Million)

Figure 28. Global Market Military & Defense AI Data Labeling Consumption Value (USD Million) Comparison by Region (2021 VS 2025 VS 2032)

Figure 29. Global Military & Defense AI Data Labeling Consumption Value Market Share by Region (2021-2032)

Figure 30. Global Military & Defense AI Data Labeling Consumption Value Market Share by Region in 2025

Figure 31. North America Military & Defense AI Data Labeling Consumption Value (2021-2032) & (USD Million)

Figure 32. Europe Military & Defense AI Data Labeling Consumption Value (2021-2032) & (USD Million)

Figure 33. Asia-Pacific Military & Defense AI Data Labeling Consumption Value (2021-2032) & (USD Million)

Figure 34. South America Military & Defense AI Data Labeling Consumption Value (2021-2032) & (USD Million)

Figure 35. Middle East & Africa Military & Defense AI Data Labeling Consumption Value (2021-2032) & (USD Million)

Figure 36. Company Three Recent Developments and Future Plans

Figure 37. Global Military & Defense AI Data Labeling Revenue Share by Players in 2025

Figure 38. Military & Defense AI Data Labeling Market Share by Company Type (Tier 1, Tier 2, and Tier 3) in 2025

Figure 39. Market Share of Military & Defense AI Data Labeling by Player Revenue in 2025

Figure 40. Top 3 Military & Defense AI Data Labeling Players Market Share in 2025

Figure 41. Top 6 Military & Defense AI Data Labeling Players Market Share in 2025

Figure 42. Global Military & Defense AI Data Labeling Consumption Value Share by Type (2021-2026)

Figure 43. Global Military & Defense AI Data Labeling Market Share Forecast by Type (2027-2032)

Figure 44. Global Military & Defense AI Data Labeling Consumption Value Share by Application (2021-2026)

Figure 45. Global Military & Defense AI Data Labeling Market Share Forecast by Application (2027-2032)

Figure 46. North America Military & Defense AI Data Labeling Consumption Value Market Share by Type (2021-2032)

Figure 47. North America Military & Defense AI Data Labeling Consumption Value Market Share by Application (2021-2032)

Figure 48. North America Military & Defense AI Data Labeling Consumption Value Market Share by Country (2021-2032)

Figure 49. United States Military & Defense AI Data Labeling Consumption Value (2021-2032) & (USD Million)

Figure 50. Canada Military & Defense AI Data Labeling Consumption Value (2021-2032) & (USD Million)

Figure 51. Mexico Military & Defense AI Data Labeling Consumption Value (2021-2032) & (USD Million)

Figure 52. Europe Military & Defense AI Data Labeling Consumption Value Market Share by Type (2021-2032)

Figure 53. Europe Military & Defense AI Data Labeling Consumption Value Market Share by Application (2021-2032)

Figure 54. Europe Military & Defense AI Data Labeling Consumption Value Market Share by Country (2021-2032)

Figure 55. Germany Military & Defense AI Data Labeling Consumption Value (2021-2032) & (USD Million)

Figure 56. France Military & Defense AI Data Labeling Consumption Value (2021-2032) & (USD Million)

Figure 57. United Kingdom Military & Defense AI Data Labeling Consumption Value (2021-2032) & (USD Million)

Figure 58. Russia Military & Defense AI Data Labeling Consumption Value (2021-2032) & (USD Million)

Figure 59. Italy Military & Defense AI Data Labeling Consumption Value (2021-2032) & (USD Million)

Figure 60. Asia-Pacific Military & Defense AI Data Labeling Consumption Value Market Share by Type (2021-2032)

Figure 61. Asia-Pacific Military & Defense AI Data Labeling Consumption Value Market Share by Application (2021-2032)

Figure 62. Asia-Pacific Military & Defense AI Data Labeling Consumption Value Market Share by Region (2021-2032)

Figure 63. China Military & Defense AI Data Labeling Consumption Value (2021-2032) & (USD Million)

Figure 64. Japan Military & Defense AI Data Labeling Consumption Value (2021-2032) & (USD Million)

Figure 65. South Korea Military & Defense AI Data Labeling Consumption Value (2021-2032) & (USD Million)

Figure 66. India Military & Defense AI Data Labeling Consumption Value (2021-2032) & (USD Million)

Figure 67. Southeast Asia Military & Defense AI Data Labeling Consumption Value (2021-2032) & (USD Million)

Figure 68. Australia Military & Defense AI Data Labeling Consumption Value

(2021-2032) & (USD Million)

Figure 69. South America Military & Defense AI Data Labeling Consumption Value Market Share by Type (2021-2032)

Figure 70. South America Military & Defense AI Data Labeling Consumption Value Market Share by Application (2021-2032)

Figure 71. South America Military & Defense AI Data Labeling Consumption Value Market Share by Country (2021-2032)

Figure 72. Brazil Military & Defense AI Data Labeling Consumption Value (2021-2032) & (USD Million)

Figure 73. Argentina Military & Defense AI Data Labeling Consumption Value (2021-2032) & (USD Million)

Figure 74. Middle East & Africa Military & Defense AI Data Labeling Consumption Value Market Share by Type (2021-2032)

Figure 75. Middle East & Africa Military & Defense AI Data Labeling Consumption Value Market Share by Application (2021-2032)

Figure 76. Middle East & Africa Military & Defense AI Data Labeling Consumption Value Market Share by Country (2021-2032)

Figure 77. Turkey Military & Defense AI Data Labeling Consumption Value (2021-2032) & (USD Million)

Figure 78. Saudi Arabia Military & Defense AI Data Labeling Consumption Value (2021-2032) & (USD Million)

Figure 79. UAE Military & Defense AI Data Labeling Consumption Value (2021-2032) & (USD Million)

Figure 80. Military & Defense AI Data Labeling Market Drivers

Figure 81. Military & Defense AI Data Labeling Market Restraints

Figure 82. Military & Defense AI Data Labeling Market Trends

Figure 83. Porters Five Forces Analysis

Figure 84. Military & Defense AI Data Labeling Industrial Chain

Figure 85. Methodology

Figure 86. Research Process and Data Source

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