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Global NDAA-compliant Drone Battery Supply, Demand and Key Producers, 2026-2032

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Abstracts

The global NDAA-compliant Drone Battery market size is expected to reach $ 983 million by 2032, rising at a market growth of 20.0% CAGR during the forecast period (2026-2032).

NDAA-compliant Drone Battery is defined in this market as the battery cell used in the primary propulsion power system of drones that meet the applicable secure-sourcing and procurement requirements, rather than the complete battery pack. The statistical boundary includes pouch, cylindrical and prismatic cells manufactured for qualifying drone programs, while standalone battery packs, BMS electronics, connectors, housings, chargers, thermal-management components, pack assembly and system-integration value are excluded. A vertically integrated company that manufactures both cells and packs is included only for the attributable cell portion. Performance is governed by a combination of gravimetric energy density, volumetric density, discharge rate, internal resistance, cycle life, low-temperature capability, thermal stability and manufacturing consistency. Mature high-power 21700 products such as Molicel's P45B and P50B operate around 242–260 Wh/kg and support approximately 45–60 A discharge, while advanced silicon-anode, lithium-metal and solid-state architectures are moving the performance envelope toward 350–500 Wh/kg. American Lithium Energy offers high-energy cells in roughly the 350–410 Wh/kg range with configurations extending to very high C-rates, Enovix launched a 360 Wh/kg MX1-B01 drone cell, and Sion Power's Licerion Strike platform targets approximately 473–500 Wh/kg at the cell level. These metrics have direct commercial value because aircraft endurance, payload, climb performance and mission radius are highly weight-sensitive. Qualification and supply-chain traceability are equally important: aviation customers can require approximately nine to eighteen months of design-in and testing before a cell converts into a volume program, creating materially higher switching costs than in commodity

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consumer batteries.

Competition is already relatively concentrated, with the five largest suppliers accounting for approximately 61.2% of 2025 global revenue. Amprius Technologies ranked first with approximately USD 49.05 million in attributable market revenue, followed by EaglePicher at USD 29.56 million, Molicel (Taiwan Cement Corporation) at USD 25.29 million, Tadiran Batteries (Saft) at USD 19.57 million and American Lithium Energy at USD 19.56 million. These suppliers occupy different competitive positions. Amprius Technologies monetizes very high specific energy through silicon-anode cells and has progressed from qualification to sizable UAS purchase orders; EaglePicher combines in-house cell manufacturing with decades of aerospace and defense qualification experience; Molicel competes through high-power cylindrical cells, manufacturing scale and strong power-to-energy characteristics; Tadiran Batteries (Saft) benefits from a mature defense and aerospace battery platform; and American Lithium Energy combines U.S. production with custom high-energy and extreme-power cell engineering. EnPower, Enovix and Ultralife form an additional established or emerging tier, while Sion Power, Factorial, SES AI and Badland Batteries (Packet Digital) become materially more relevant from 2026 as new cell platforms enter commercial deployment. Amprius' USD 15 million UAS cell order in February 2025 and subsequent order exceeding USD 35 million in September demonstrate how qualified high-performance cells can progress rapidly from design-in to large procurement commitments.

Pouch cells dominate the product mix because they provide the highest degree of geometric freedom and allow aircraft designers to optimize energy content within a tightly constrained mass and volume envelope. In 2025, pouch cells represented 133.39 MWh, or 59.32% of global volume, and USD 147.10 million, or 62.90% of global revenue, at an average ex-works price of USD 1.10/Wh. Their revenue share is higher than their volume share because pouch architectures are widely used in customized high-specific-energy applications where qualification, electrode formulation and packaging requirements support a premium over standardized formats. Pouch-cell volume is forecast to grow at approximately 20.12% CAGR from 2026 to 2032, slightly faster than the total market, supported by silicon-rich anodes, lithium-metal and solid-state platforms that are frequently commercialized first in pouch form. The manufacturing challenge is not the form factor alone: electrode loading uniformity, swelling control, tab design, thermal behavior, stack pressure and cell-to-cell consistency become increasingly demanding as energy density rises, particularly when drone platforms combine high cruise endurance with high pulse-power requirements for takeoff, acceleration or maneuvering.

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Cylindrical cells represented 62.10 MWh, or 27.62% of 2025 volume, and USD 58.22 million, or 24.90% of revenue, at an average price of USD 0.94/Wh. Their relatively low unit value reflects a greater degree of standardization and manufacturing automation, but the segment should not be treated as commodity supply: high-power 18650 and 21700 products used in drones require low impedance, strong thermal stability and tight consistency under high discharge. Molicel's P45B and P50B illustrate the commercial logic of the segment, combining standardized 21700 geometry with aviation-relevant power and energy performance. Cylindrical-cell volume is forecast to grow at 18.43% CAGR through 2032. Prismatic cells accounted for 29.37 MWh, or 13.06% of 2025 volume, with USD 28.54 million of revenue and a USD 0.97/Wh average price. Their main value lies in mechanical robustness, efficient use of larger pack volumes and reduced interconnection count, making them more suitable for selected larger industrial or military platforms. Prismatic volume is projected to grow at 18.44% CAGR from 2026 to 2032, remaining a smaller but stable part of the market.

Application economics are increasingly determined by mission criticality rather than aircraft category alone. Consumer Drone applications consumed 50.66 MWh in 2025, equivalent to 22.53% of global volume, but represented only USD 30.69 million, or 13.12% of revenue, because the average cell price was approximately USD 0.61/Wh. Industrial Drone applications were the largest by volume at 97.13 MWh, or 43.20%, and generated USD 98.55 million at approximately USD 1.01/Wh. These systems include inspection, mapping, logistics, emergency response, communications, surveying and high-utilization commercial platforms where cycle life, rapid charging and predictable operating cost are important. Military Drone applications consumed 77.07 MWh, or 34.27% of volume, yet generated USD 104.62 million, equal to 44.74% of global revenue, at an average cell price of USD 1.36/Wh. Military customers pay for performance margin, qualification, traceability and lifecycle supply assurance rather than energy content alone. The revenue CAGR from 2026 to 2032 is approximately 16.67% for Consumer Drone, 20.77% for Industrial Drone and 21.25% for Military Drone, making defense the strongest value-growth segment and industrial applications the largest broad-based volume-growth platform.

Regional demand is led by the United States, which accounted for 104.55 MWh or 46.50% of 2025 global volume, reflecting the combination of defense procurement, autonomous-system investment, public-safety applications and domestic supply-chain initiatives. Europe represented 49.78 MWh or 22.14%, supported by defense ISR, border security, industrial inspection and dual-use UAS programs across the United Kingdom, Germany, France, Nordic countries and other European markets. Japan contributed 18.36 MWh or 8.17%, while South Korea accounted for 16.99 MWh or

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7.56%, with both markets benefiting from established high-quality manufacturing ecosystems and advanced battery capability. Other regions represented 35.18 MWh or 15.65%. U.S. demand is projected to rise to 134.48 MWh in 2026 and 393.72 MWh in 2032, preserving its position as the largest market. China is not separately reported in the regional dataset and applicable end-market demand is contained within Other regions; under the strict statistical boundary used here, China-origin cells are not automatically counted as qualifying core supply. China nevertheless remains highly influential in the broader lithium-ion ecosystem through cathode and anode materials, separators, electrolyte, copper and aluminum foil, and battery-production equipment. As a result, localization is better understood as progressive risk reduction and qualification of alternative sources rather than immediate removal of Asian industrial dependencies. The U.S. federal procurement framework has also tightened controls on covered foreign UAS sources and strengthened supply-source identification, reinforcing the commercial importance of traceability.

Upstream economics are increasingly shaped by specialized materials rather than lithium alone. High-nickel cathodes, silicon-rich anodes, lithium-metal foils, advanced separators, high-voltage electrolytes, functional additives and high-purity current collectors determine whether a cell can simultaneously deliver energy, power, safety and cycle life. Silicon increases specific energy but creates expansion and interface-management challenges; lithium-metal architectures push energy density further but increase the importance of electrolyte stability, dendrite control and manufacturing uniformity. The manufacturing sequence—mixing, coating, calendaring, slitting, drying, stacking or winding, electrolyte filling, formation, aging and final inspection—creates several yield-sensitive steps. For a high-value drone cell, a small deterioration in coating uniformity or formation yield can offset the economic benefit of higher selling price. Supply-chain risk extends beyond material price: the actual manufacturer, manufacturing site, technology licensing, material origin and engineering-change history increasingly become procurement variables. This places a premium on companies that can combine advanced chemistry with stable industrial process control and documented alternative sources.

Midstream profitability depends on qualification depth, yield, utilization and customer concentration. The modeled global gross margin for the market was approximately 24.16% in 2025, with mature defense and aerospace specialty-cell suppliers typically operating above early-stage technology entrants because they already possess qualified processes, long-standing customer programs and established manufacturing controls. Downstream, independent battery-pack manufacturers such as Inventus, Custom Power, Epsilor, Denchi and Bren-Tronics purchase qualified cells and add BMS

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electronics, interconnects, thermal management, structures and pack-level validation. Drone manufacturers such as AeroVironment, Anduril, Skydio, Quantum Systems and Elbit Systems may purchase cells directly, specify cells to an approved pack supplier, or integrate battery systems internally. Changing a cell after aircraft qualification affects voltage curves, impedance, heat generation, weight, state-of-charge calibration and sometimes flight-control behavior, producing high switching costs. The preferred procurement architecture is therefore increasingly dual qualification: maintaining a primary cell while validating at least one alternative secure source before a supply disruption occurs.

The most important 2025–2026 industry events confirm that the market is moving from laboratory performance toward commercial deployment and localized manufacturing. Enovix launched its South Korea-produced MX1-B01 drone cell at 360 Wh/kg in 2026. SES AI announced preparation of its Korean facility for NDAA-compliant drone-cell production. Packet Digital and Badland Batteries received a USD 27 million Phase III SBIR award and a USD 9.8 million U.S. Navy award in 2026 as the Fargo cell plant moved into commissioning and higher-volume manufacturing. Sion Power's Licerion Strike ST-20 and ST-30 are scheduled for availability in the third and fourth quarters of 2026 with cell specific energy around 473–500 Wh/kg. Factorial progressed from its 2025 Avidrone demonstration deployment to partnerships with drone integrators in the United States, Europe and South Korea, followed by its first commercial aerospace cell order in July 2026. These developments indicate that the principal 2026–2032 growth engine will be a combination of more UAS platforms, higher cell energy per aircraft, replacement demand, rapid defense deployment, localization of trusted supply, and substitution of conventional lithium-ion cells with higher-energy silicon, lithium-metal and solid-state technologies.

Report Scope

This report studies the global NDAA-compliant Drone Battery production, demand, key manufacturers, and key regions.

This report is a detailed and comprehensive analysis of the world market for NDAA-compliant Drone Battery 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 NDAA-compliant Drone Battery that contribute to its increasing demand across many markets.

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Highlights and key features of the study

Global NDAA-compliant Drone Battery total production and demand, 2021-2032, (MWh)

Global NDAA-compliant Drone Battery total production value, 2021-2032, (USD Million)

Global NDAA-compliant Drone Battery production by region & country, production, value, CAGR, 2021-2032, (USD Million) & (MWh), (based on production site)

Global NDAA-compliant Drone Battery consumption by region & country, CAGR, 2021-2032 & (MWh)

U.S. VS China: NDAA-compliant Drone Battery domestic production, consumption, key domestic manufacturers and share

Global NDAA-compliant Drone Battery production by manufacturer, production, price, value and market share 2021-2026, (USD Million) & (MWh)

Global NDAA-compliant Drone Battery production by Packaging, production, value, CAGR, 2021-2032, (USD Million) & (MWh)

Global NDAA-compliant Drone Battery production by Application, production, value, CAGR, 2021-2032, (USD Million) & (MWh)

This report profiles key players in the global NDAA-compliant Drone Battery market based on the following parameters - company overview, production, value, price, gross margin, product portfolio, geographical presence, and key developments. Key companies covered as a part of this study include Amprius Technologies, EaglePicher, Molicel (Taiwan Cement Corporation), Tadiran Batteries (Saft), American Lithium Energy, EnPower, Enovix, Ultralife, Sion Power, Factorial, etc.

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

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Stakeholders would have ease in decision-making through various strategy matrices used in analyzing the World NDAA-compliant Drone Battery market

Detailed Segmentation:

Each section contains quantitative market data including market by value (US$ Millions), volume (production, consumption) & (MWh) and average price (USD/Wh) by manufacturer, by Packaging, 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 NDAA-compliant Drone Battery Market, By Region:

United States

China

Europe

Japan

South Korea

ASEAN

India

Rest of World

Market Segmentation

Global NDAA-compliant Drone Battery Market, Segmentation by Packaging:

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Pouch

Cylindrical

Prismatic

Global NDAA-compliant Drone Battery Market, Segmentation by Negative Electrode:

Lithium Polymer Battery

Lithium-ion Battery (excluding Li-Po type)

Lithium Metal Battery

Others

Global NDAA-compliant Drone Battery Market, Segmentation by Application:

Consumer Drone

Industrial Drone

Military Drone

Companies Profiled:

Amprius Technologies

EaglePicher

Molicel (Taiwan Cement Corporation)

Tadiran Batteries (Saft)

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American Lithium Energy

EnPower

Enovix

Ultralife

Sion Power

Factorial

SES AI

Badland Batteries (Packet Digital)

Key Questions Answered

1. How big is the global NDAA-compliant Drone Battery market?
2. What is the demand of the global NDAA-compliant Drone Battery market?
3. What is the year over year growth of the global NDAA-compliant Drone Battery market?
4. What is the total value of the global NDAA-compliant Drone Battery market?
5. Who are the Major Players in the global NDAA-compliant Drone Battery market?
6. What are the growth factors driving the market demand?

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