

Global Military & Defense AI Data Labeling Market Growth (Status and Outlook) 2026-2032

<https://marketpublishers.com/r/G1D7C9CC2476EN.html>

Date: July 2026

Pages: 154

Price: US\$ 3,660.00 (Single User License)

ID: G1D7C9CC2476EN

Abstracts

The global Military & Defense AI Data Labeling market size is predicted to grow from US\$ 2729 million in 2025 to US\$ 31988 million in 2032; it is expected to grow at a CAGR of 42.5% from 2026 to 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.

LPI (LP Information)' newest research report, the "Military & Defense AI Data Labeling Industry Forecast" looks at past sales and reviews total world Military & Defense AI Data Labeling sales in 2025, providing a comprehensive analysis by region and market sector of projected Military & Defense AI Data Labeling sales for 2026 through 2032. With Military & Defense AI Data Labeling sales broken down by region, market sector and sub-sector, this report provides a detailed analysis in US\$ millions of the world Military & Defense AI Data Labeling industry.

This Insight Report provides a comprehensive analysis of the global Military & Defense AI Data Labeling landscape and highlights key trends related to product segmentation, company formation, revenue, and market share, latest development, and M&A activity. This report also analyses the strategies of leading global companies with a focus on Military & Defense AI Data Labeling portfolios and capabilities, market entry strategies, market positions, and geographic footprints, to better understand these firms' unique position in an accelerating global Military & Defense AI Data Labeling market.

This Insight Report evaluates the key market trends, drivers, and affecting factors shaping the global outlook for Military & Defense AI Data Labeling and breaks down the forecast by Type, by Application, geography, and market size to highlight emerging pockets of opportunity. With a transparent methodology based on hundreds of bottom-up qualitative and quantitative market inputs, this study forecast offers a highly nuanced view of the current state and future trajectory in the global Military & Defense AI Data Labeling.

This report presents a comprehensive overview, market shares, and growth opportunities of Military & Defense AI Data Labeling market by product type, application, key players and key regions and countries.

Segmentation by Type:

Object Detection & Tracking

Semantic Segmentation

Change Detection

Signal Classification

Entity Recognition

Sensor Fusion Alignment

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

Segmentation by Application:

Intelligence, Surveillance & Reconnaissance (ISR)

Autonomous Systems

Electronic Warfare & Signal Intelligence

Battlefield Situational Awareness

Military Mapping & Navigation

This report also splits the market by region:

Americas

United States

Canada

Mexico

Brazil

APAC

China

Japan

Korea

Southeast Asia

India

Australia

Europe

Germany

France

UK

Italy

Russia

Middle East & Africa

Egypt

South Africa

Israel

Turkey

GCC Countries

The below companies that are profiled have been selected based on inputs gathered from primary experts and analyzing the company's coverage, product portfolio, its market penetration.

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

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