

Middle East & Africa Airborne ISR as a Service Market Size and Forecast (2021 - 2031)

<https://marketpublishers.com/r/MFFD8DC76D5FEN.html>

Date: April 2026

Pages: 210

Price: US\$ 3,450.00 (Single User License)

ID: MFFD8DC76D5FEN

Abstracts

The Airborne Intelligence, Surveillance, and Reconnaissance (ISR) as a Service market in the Middle East and Africa is poised for significant growth, with projections indicating an increase from US\$ 1,448.1 million in 2024 to US\$ 2,510.7 million by 2031. This growth trajectory reflects a compound annual growth rate (CAGR) of 8.4% from 2025 to 2031, driven by a combination of escalating security challenges, ongoing regional conflicts, and rising defense budgets across the region.

The demand for advanced airborne ISR platforms is being fueled by the need for enhanced situational awareness, improved border security, and effective counterterrorism operations. Countries in the Middle East and Africa are increasingly recognizing the strategic importance of airborne ISR capabilities, which are being integrated with cutting-edge technologies such as artificial intelligence (AI) and machine learning (ML). These technologies facilitate real-time data analytics, thereby enhancing decision-making processes in defense operations.

Collaborative efforts between local governments and international defense manufacturers are further propelling the development and deployment of airborne ISR services. This collaboration positions the Middle East and Africa as a burgeoning market within the global defense sector. Notably, Saudi Arabia is at the forefront of this investment, channeling substantial resources into airborne ISR systems to bolster its defense and border surveillance capabilities. The United Arab Emirates (UAE) is also a key player, actively incorporating state-of-the-art ISR platforms to strengthen its regional security posture. Israel, with its advanced defense technology sector, is making significant contributions to ISR innovation and deployment, while Turkey emphasizes tactical ISR applications to support its regional operations. Iraq, facing a complex security environment, is also focused on enhancing its intelligence and reconnaissance

capabilities.

In addition, countries like Jordan and Egypt are prioritizing improvements in surveillance along critical borders. South Africa emerges as a significant player in the African context, with ongoing development and export of indigenous ISR systems. The persistent geopolitical instability in the region is a major driver for the demand for advanced ISR solutions, which are essential for monitoring borders and combating terrorism. Furthermore, rising concerns over transnational threats, including smuggling and illegal migration, are accelerating the adoption of ISR technologies. Government-backed research initiatives and regional partnerships are also contributing to the enhancement of ISR capabilities across various nations, while advancements in sensor technologies and platform agility are expanding operational capabilities and coverage.

The market segmentation of the Middle East and Africa Airborne ISR as a Service market reveals two primary categories: platform type and application. By platform type, the market is divided into piloted aircraft and remote-controlled aircraft, with the piloted aircraft segment dominating in 2024. In terms of application, the market is segmented into military and defense, homeland security, and commercial sectors, with military and defense applications leading the market in 2024.

The outlook for the Middle East and Africa Airborne ISR as a Service market is promising, as governments across Europe, Asia Pacific, and the Middle East increasingly prioritize military modernization and security resilience in response to evolving geopolitical tensions and cross-border threats. Many countries are allocating significant portions of their defense budgets to enhance ISR capabilities, recognizing the strategic value of aerial intelligence for mission planning, threat detection, and situational awareness. This financial commitment is driving the demand for flexible, service-based ISR solutions that offer cost efficiency, scalability, and access to advanced platforms without necessitating extensive in-house infrastructure.

In the Middle East and Africa, the escalating geopolitical instability and commitments to border protection have led nations such as Saudi Arabia, the UAE, and Israel to invest heavily in airborne ISR technologies. These investments enable defense organizations to leverage service-based ISR models, providing real-time, high-accuracy intelligence while optimizing operational costs. Collectively, the growing defense budgets and technological investments across these regions are accelerating the adoption of airborne ISR as a service, establishing it as a critical component of modern defense strategies and integrated intelligence networks.

Country-wise, the market is segmented into South Africa, Saudi Arabia, the UAE, Iraq, Turkey, Jordan, Israel, Egypt, and the Rest of the Middle East and Africa. The Rest of the Middle East and Africa held the largest market share in 2024. This segment encompasses a diverse array of countries facing unique security challenges, including those in North Africa and sub-Saharan Africa. The increasing need for enhanced security, border protection, counter-terrorism, and maritime surveillance in these areas is a primary driver for the demand for airborne ISR solutions.

Several factors are propelling market growth in the Rest of the Middle East and Africa, including persistent threats from terrorism and regional conflicts. Countries in this region are increasingly recognizing the value of outsourced airborne ISR services, which provide cost-efficient, flexible, and technologically advanced solutions without the need for substantial capital investment in hardware. Advancements in unmanned aerial vehicle technology, AI-driven analytics, and miniaturized sensor systems are enhancing ISR effectiveness, further fueling adoption.

In summary, the airborne ISR as a service market in the Middle East and Africa is witnessing robust growth driven by urgent security needs, technological advancements, and strategic government-industry collaborations. This evolving landscape positions the region as a significant emerging market within the global airborne ISR as a service sector. Key players in this market include QinetiQ Group Plc, Cubic Corp, AeroVironment Inc, and others, who are employing strategies such as expansion, product innovation, and mergers and acquisitions to enhance their market presence.

Contents

1. INTRODUCTION

- 1.1 Report Guidance
- 1.2 Market Segmentation

2. EXECUTIVE SUMMARY

- 2.1 Key Insights
- 2.2 Market Attractiveness

3. RESEARCH METHODOLOGY

- 3.1 Secondary Research
- 3.2 Primary Research
 - 3.2.1 Hypothesis formulation:
 - 3.2.2 Macroeconomic factor analysis:
 - 3.2.3 Developing base number:
 - 3.2.4 Data Triangulation:
 - 3.2.5 Country-level data:

4. AIRBORNE ISR AS A SERVICE MARKET LANDSCAPE

- 4.1 Market Overview
- 4.2 PEST Analysis
- 4.3 Ecosystem Analysis
 - 4.3.1 List of Vendors in the Value Chain

5. MIDDLE EAST & AFRICA AIRBORNE ISR AS A SERVICE MARKET - KEY MARKET DYNAMICS

- 5.1 Market Drivers
- 5.2 Market Restraints
- 5.3 Market Opportunities
- 5.4 Future Trends
- 5.5 Impact of Drivers and Restraints:

6. AIRBORNE ISR AS A SERVICE MARKET - MIDDLE EAST & AFRICA MARKET

ANALYSIS

6.1 Middle East & Africa Airborne ISR as a Service Market Revenue (US\$ Million), 2024 - 2031

6.2 Middle East & Africa Airborne ISR as a Service Market Forecast and Analysis

7. MIDDLE EAST & AFRICA AIRBORNE ISR AS A SERVICE MARKET REVENUE ANALYSIS - BY PLATFORM TYPE

7.1 Piloted Aircrafts

7.1.1 Overview

7.1.2 Piloted Aircrafts: Middle East & Africa Airborne ISR as a Service Market - Revenue and Forecast, 2021 - 2031 (US\$ Million)

7.2 Remote Controlled Aircrafts

7.2.1 Overview

7.2.2 Remote Controlled Aircrafts: Middle East & Africa Airborne ISR as a Service Market - Revenue and Forecast, 2021 - 2031 (US\$ Million)

8. MIDDLE EAST & AFRICA AIRBORNE ISR AS A SERVICE MARKET REVENUE ANALYSIS - BY APPLICATION

8.1 Military and Defense

8.1.1 Overview

8.1.2 Military and Defense: Middle East & Africa Airborne ISR as a Service Market - Revenue and Forecast, 2021 - 2031 (US\$ Million)

8.2 Homeland Security

8.2.1 Overview

8.2.2 Homeland Security: Middle East & Africa Airborne ISR as a Service Market - Revenue and Forecast, 2021 - 2031 (US\$ Million)

8.3 Commercial

8.3.1 Overview

8.3.2 Commercial: Middle East & Africa Airborne ISR as a Service Market - Revenue and Forecast, 2021 - 2031 (US\$ Million)

9. MIDDLE EAST & AFRICA AIRBORNE ISR AS A SERVICE MARKET - COUNTRY ANALYSIS

9.1 Middle East & Africa

9.1.1 Middle East & Africa Airborne ISR as a Service Market Revenue and Forecast

and Analysis - by Country

9.1.1.1 Middle East & Africa Airborne ISR as a Service Market Revenue and Forecast and Analysis - by Country

9.1.2.2 South Africa: Middle East & Africa Airborne ISR as a Service Market - Revenue and Forecast, 2021 - 2031 (US\$ Million)

9.1.2.2.1 South Africa: Middle East & Africa Airborne ISR as a Service Market Share - by Platform Type

9.1.2.2.2 South Africa: Middle East & Africa Airborne ISR as a Service Market Share - by Application

9.2.3.3 Saudi Arabia: Middle East & Africa Airborne ISR as a Service Market - Revenue and Forecast, 2021 - 2031 (US\$ Million)

9.2.3.3.1 Saudi Arabia: Middle East & Africa Airborne ISR as a Service Market Share - by Platform Type

9.2.3.3.2 Saudi Arabia: Middle East & Africa Airborne ISR as a Service Market Share - by Application

9.3.4.4 United Arab Emirates: Middle East & Africa Airborne ISR as a Service Market - Revenue and Forecast, 2021 - 2031 (US\$ Million)

9.3.4.4.1 United Arab Emirates: Middle East & Africa Airborne ISR as a Service Market Share - by Platform Type

9.3.4.4.2 United Arab Emirates: Middle East & Africa Airborne ISR as a Service Market Share - by Application

9.4.5.5 Iraq: Middle East & Africa Airborne ISR as a Service Market - Revenue and Forecast, 2021 - 2031 (US\$ Million)

9.4.5.5.1 Iraq: Middle East & Africa Airborne ISR as a Service Market Share - by Platform Type

9.4.5.5.2 Iraq: Middle East & Africa Airborne ISR as a Service Market Share - by Application

9.5.6.6 Turkey: Middle East & Africa Airborne ISR as a Service Market - Revenue and Forecast, 2021 - 2031 (US\$ Million)

9.5.6.6.1 Turkey: Middle East & Africa Airborne ISR as a Service Market Share - by Platform Type

9.5.6.6.2 Turkey: Middle East & Africa Airborne ISR as a Service Market Share - by Application

9.6.7.7 Jordan: Middle East & Africa Airborne ISR as a Service Market - Revenue and Forecast, 2021 - 2031 (US\$ Million)

9.6.7.7.1 Jordan: Middle East & Africa Airborne ISR as a Service Market Share - by Platform Type

9.6.7.7.2 Jordan: Middle East & Africa Airborne ISR as a Service Market Share - by Application

9.7.8.8 Israel: Middle East & Africa Airborne ISR as a Service Market - Revenue and Forecast, 2021 - 2031 (US\$ Million)

9.7.8.8.1 Israel: Middle East & Africa Airborne ISR as a Service Market Share - by Platform Type

9.7.8.8.2 Israel: Middle East & Africa Airborne ISR as a Service Market Share - by Application

9.8.9.9 Egypt: Middle East & Africa Airborne ISR as a Service Market - Revenue and Forecast, 2021 - 2031 (US\$ Million)

9.8.9.9.1 Egypt: Middle East & Africa Airborne ISR as a Service Market Share - by Platform Type

9.8.9.9.2 Egypt: Middle East & Africa Airborne ISR as a Service Market Share - by Application

9.9.10.10 Rest of Middle East & Africa: Middle East & Africa Airborne ISR as a Service Market - Revenue and Forecast, 2021 - 2031 (US\$ Million)

9.9.10.10.1 Rest of Middle East & Africa: Middle East & Africa Airborne ISR as a Service Market Share - by Platform Type

9.9.10.10.2 Rest of Middle East & Africa: Middle East & Africa Airborne ISR as a Service Market Share - by Application

10 COMPETITIVE LANDSCAPE

10.1 Heat Map Analysis by Key Players

10.2 Company Positioning & Concentration

11 INDUSTRY LANDSCAPE

11.1 Overview

11.2 New Product Development

11.3 Merger and Acquisition

11.4 Other Strategic Developments

12 COMPANY PROFILES

12.1 QinetiQ Group Plc

12.1.1 Key Facts

12.1.2 Business Description

12.1.3 Products and Services

12.1.4 Financial Overview

12.1.5 SWOT Analysis

- 12.1.6 Key Developments
- 12.2 Cubic Corp
 - 12.2.1 Key Facts
 - 12.2.2 Business Description
 - 12.2.3 Products and Services
 - 12.2.4 Financial Overview
 - 12.2.5 SWOT Analysis
 - 12.2.6 Key Developments
- 12.3 AeroVironment Inc
 - 12.3.1 Key Facts
 - 12.3.2 Business Description
 - 12.3.3 Products and Services
 - 12.3.4 Financial Overview
 - 12.3.5 SWOT Analysis
 - 12.3.6 Key Developments
- 12.4 DEA Aviation Limited
 - 12.4.1 Key Facts
 - 12.4.2 Business Description
 - 12.4.3 Products and Services
 - 12.4.4 Financial Overview
 - 12.4.5 SWOT Analysis
 - 12.4.6 Key Developments
- 12.5 EASP AIR
 - 12.5.1 Key Facts
 - 12.5.2 Business Description
 - 12.5.3 Products and Services
 - 12.5.4 Financial Overview
 - 12.5.5 SWOT Analysis
 - 12.5.6 Key Developments
- 12.6 Asman Technology
 - 12.6.1 Key Facts
 - 12.6.2 Business Description
 - 12.6.3 Products and Services
 - 12.6.4 Financial Overview
 - 12.6.5 SWOT Analysis
 - 12.6.6 Key Developments
- 12.7 PAL Aerospace
 - 12.7.1 Key Facts
 - 12.7.2 Business Description

- 12.7.3 Products and Services
- 12.7.4 Financial Overview
- 12.7.5 SWOT Analysis
- 12.7.6 Key Developments
- 12.8 Elevated Technologies
 - 12.8.1 Key Facts
 - 12.8.2 Business Description
 - 12.8.3 Products and Services
 - 12.8.4 Financial Overview
 - 12.8.5 SWOT Analysis
 - 12.8.6 Key Developments
- 12.9 MAG Aerospace
 - 12.9.1 Key Facts
 - 12.9.2 Business Description
 - 12.9.3 Products and Services
 - 12.9.4 Financial Overview
 - 12.9.5 SWOT Analysis
 - 12.9.6 Key Developments
- 12.10 CADG
 - 12.10.1 Key Facts
 - 12.10.2 Business Description
 - 12.10.3 Products and Services
 - 12.10.4 Financial Overview
 - 12.10.5 SWOT Analysis
 - 12.10.6 Key Developments
- 12.11 AIRTEC, Inc.
 - 12.11.1 Key Facts
 - 12.11.2 Business Description
 - 12.11.3 Products and Services
 - 12.11.4 Financial Overview
 - 12.11.5 SWOT Analysis
 - 12.11.6 Key Developments
- 12.12 CAE Aviation
 - 12.12.1 Key Facts
 - 12.12.2 Business Description
 - 12.12.3 Products and Services
 - 12.12.4 Financial Overview
 - 12.12.5 SWOT Analysis
 - 12.12.6 Key Developments

12.13 North Sea Aviation Services

12.13.1 Key Facts

12.13.2 Business Description

12.13.3 Products and Services

12.13.4 Financial Overview

12.13.5 SWOT Analysis

12.13.6 Key Developments

12.14 LMO Fly

12.14.1 Key Facts

12.14.2 Business Description

12.14.3 Products and Services

12.14.4 Financial Overview

12.14.5 SWOT Analysis

12.14.6 Key Developments

12.15 GEOFIT Group

12.15.1 Key Facts

12.15.2 Business Description

12.15.3 Products and Services

12.15.4 Financial Overview

12.15.5 SWOT Analysis

12.15.6 Key Developments

12.16 Kav Madaida

12.16.1 Key Facts

12.16.2 Business Description

12.16.3 Products and Services

12.16.4 Financial Overview

12.16.5 SWOT Analysis

12.16.6 Key Developments

12.17 GeoDrones

12.17.1 Key Facts

12.17.2 Business Description

12.17.3 Products and Services

12.17.4 Financial Overview

12.17.5 SWOT Analysis

12.17.6 Key Developments

13. APPENDIX

13.1 About The Insight Partners

List Of Tables

LIST OF TABLES

Table 1. Middle East & Africa Airborne ISR as a Service Market Segmentation

Table 2. List of Vendors

Table 3. Middle East & Africa Airborne ISR as a Service Market - Revenue and Forecast, 2021 - 2031 (US\$ Million)

Table 4. Middle East & Africa Airborne ISR as a Service Market - Revenue and Forecast, 2021 - 2031 (US\$ Million) - by Platform Type

Table 5. Middle East & Africa Airborne ISR as a Service Market - Revenue and Forecast, 2021 - 2031 (US\$ Million) - by Application

Table 6. Middle East & Africa Airborne ISR as a Service Market - Revenue and Forecast, 2021 - 2031 (US\$ Million) - by Country

Table 7. South Africa: Middle East & Africa Airborne ISR as a Service Market - Revenue and Forecast, 2021 - 2031 (US\$ Million) - by Platform Type

Table 8. South Africa: Middle East & Africa Airborne ISR as a Service Market - Revenue and Forecast, 2021 - 2031 (US\$ Million) - by Application

Table 9. Saudi Arabia: Middle East & Africa Airborne ISR as a Service Market - Revenue and Forecast, 2021 - 2031 (US\$ Million) - by Platform Type

Table 10. Saudi Arabia: Middle East & Africa Airborne ISR as a Service Market - Revenue and Forecast, 2021 - 2031 (US\$ Million) - by Application

Table 11. United Arab Emirates: Middle East & Africa Airborne ISR as a Service Market - Revenue and Forecast, 2021 - 2031 (US\$ Million) - by Platform Type

Table 12. United Arab Emirates: Middle East & Africa Airborne ISR as a Service Market - Revenue and Forecast, 2021 - 2031 (US\$ Million) - by Application

Table 13. Iraq: Middle East & Africa Airborne ISR as a Service Market - Revenue and Forecast, 2021 - 2031 (US\$ Million) - by Platform Type

Table 14. Iraq: Middle East & Africa Airborne ISR as a Service Market - Revenue and Forecast, 2021 - 2031 (US\$ Million) - by Application

Table 15. Turkey: Middle East & Africa Airborne ISR as a Service Market - Revenue and Forecast, 2021 - 2031 (US\$ Million) - by Platform Type

Table 16. Turkey: Middle East & Africa Airborne ISR as a Service Market - Revenue and Forecast, 2021 - 2031 (US\$ Million) - by Application

Table 17. Jordan: Middle East & Africa Airborne ISR as a Service Market - Revenue and Forecast, 2021 - 2031 (US\$ Million) - by Platform Type

Table 18. Jordan: Middle East & Africa Airborne ISR as a Service Market - Revenue and Forecast, 2021 - 2031 (US\$ Million) - by Application

Table 19. Israel: Middle East & Africa Airborne ISR as a Service Market - Revenue and Forecast, 2021 - 2031 (US\$ Million) - by Platform Type

Table 20. Israel: Middle East & Africa Airborne ISR as a Service Market - Revenue and Forecast, 2021 - 2031 (US\$ Million) - by Application

Table 21. Egypt: Middle East & Africa Airborne ISR as a Service Market - Revenue and Forecast, 2021 - 2031 (US\$ Million) - by Platform Type

Table 22. Egypt: Middle East & Africa Airborne ISR as a Service Market - Revenue and Forecast, 2021 - 2031 (US\$ Million) - by Application

Table 23. Rest of Middle East & Africa: Middle East & Africa Airborne ISR as a Service Market - Revenue and Forecast, 2021 - 2031 (US\$ Million) - by Platform Type

Table 24. Rest of Middle East & Africa: Middle East & Africa Airborne ISR as a Service Market - Revenue and Forecast, 2021 - 2031 (US\$ Million) - by Application

Table 25. Heat Map Analysis by Key Players

List Of Figures

LIST OF FIGURES

Figure 1. Middle East & Africa Airborne ISR as a Service Market Segmentation - Country

Figure 2. PEST Analysis

Figure 3. Ecosystem: Airborne ISR as a Service Market

Figure 4. Middle East & Africa Airborne ISR as a Service Market - Key Market Dynamics

Figure 5. Impact Analysis of Drivers and Restraints

Figure 6. Middle East & Africa Airborne ISR as a Service Market Revenue (US\$ Million), 2024 - 2031

Figure 7. Middle East & Africa Airborne ISR as a Service Market Share (%) - by Platform Type, 2024 and 2031

Figure 8. Piloted Aircrafts: Middle East & Africa Airborne ISR as a Service Market - Revenue and Forecast, 2021 - 2031 (US\$ Million)

Figure 9. Remote Controlled Aircrafts: Middle East & Africa Airborne ISR as a Service Market - Revenue and Forecast, 2021 - 2031 (US\$ Million)

Figure 10. Middle East & Africa Airborne ISR as a Service Market Share (%) - by Application, 2024 and 2031

Figure 11. Military and Defense: Middle East & Africa Airborne ISR as a Service Market - Revenue and Forecast, 2021 - 2031 (US\$ Million)

Figure 12. Homeland Security: Middle East & Africa Airborne ISR as a Service Market - Revenue and Forecast, 2021 - 2031 (US\$ Million)

Figure 13. Commercial: Middle East & Africa Airborne ISR as a Service Market - Revenue and Forecast, 2021 - 2031 (US\$ Million)

Figure 14. Middle East & Africa Airborne ISR as a Service Market Breakdown by Key Countries, 2024 and 2031 (%)

Figure 15. South Africa: Middle East & Africa Airborne ISR as a Service Market - Revenue and Forecast, 2021 - 2031 (US\$ Million)

Figure 16. Saudi Arabia: Middle East & Africa Airborne ISR as a Service Market - Revenue and Forecast, 2021 - 2031 (US\$ Million)

Figure 17. United Arab Emirates: Middle East & Africa Airborne ISR as a Service Market - Revenue and Forecast, 2021 - 2031 (US\$ Million)

Figure 18. Iraq: Middle East & Africa Airborne ISR as a Service Market - Revenue and Forecast, 2021 - 2031 (US\$ Million)

Figure 19. Turkey: Middle East & Africa Airborne ISR as a Service Market - Revenue and Forecast, 2021 - 2031 (US\$ Million)

Figure 20. Jordan: Middle East & Africa Airborne ISR as a Service Market - Revenue and Forecast, 2021 - 2031 (US\$ Million)

Figure 21. Israel: Middle East & Africa Airborne ISR as a Service Market - Revenue and Forecast, 2021 - 2031 (US\$ Million)

Figure 22. Egypt: Middle East & Africa Airborne ISR as a Service Market - Revenue and Forecast, 2021 - 2031 (US\$ Million)

Figure 23. Rest of Middle East & Africa: Middle East & Africa Airborne ISR as a Service Market - Revenue and Forecast, 2021 - 2031 (US\$ Million)

Figure 24. Company Positioning & Concentration

I would like to order

Product name: Middle East & Africa Airborne ISR as a Service Market Size and Forecast (2021 - 2031)

Product link: <https://marketpublishers.com/r/MFFD8DC76D5FEN.html>

Price: US\$ 3,450.00 (Single User License / Electronic Delivery)

If you want to order Corporate License or Hard Copy, please, contact our Customer Service:

info@marketpublishers.com

Payment

To pay by Credit Card (Visa, MasterCard, American Express, PayPal), please, click button on product page <https://marketpublishers.com/r/MFFD8DC76D5FEN.html>