

Asia-Pacific Tactical UAV - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts 2019 - 2029

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Report description:

The Asia-Pacific tactical UAV market was valued at USD 5.11 billion in 2024 and is projected to reach 9.45 billion by 2029, registering a CAGR of 13.09% during the forecast period.

In recent years, there has been rapid growth in technological advancements and trends in unmanned systems. The introduction of newer-generation tactical UAVs and the growing demand for advanced unmanned solutions for various military operations drive the growth of the market. Several UAV manufacturers are developing next-generation tactical UAVs with an advanced payload of electro-optical or infrared sensors, with capabilities to transmit live video and other invaluable information that can empower troops. Recently, China unveiled an unidentified jet UAV and a tactical UAV designed for electronic warfare and countermeasure purposes.

Furthermore, growing defense expenditure from countries like China, India, Japan, and South Korea and growing adoption of advanced UAVs to improve defense capabilities boost the market growth across the region. Several countries in the region are developing their own tactical UAV capabilities. Due to the ongoing R&D efforts toward the development of indigenous, advanced tactical UAVs are projected to drive market growth in the region during the forecast period. Stringent government regulations on the usage of UAVs and the use of small drones for criminal activities hampers the market growth across the Asia-Pacific.

Asia-Pacific Tactical UAV Market Trends

Military Segment Will Showcase Remarkable Growth During the Forecast Period

The military segment is projected to show significant growth in the Asia Pacific tactical UAV market during the forecast period.

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The growth is due to growing defense expenditure from China, India, and South Korea and rising procurement of advanced tactical UAVs for military operations. China's People's Liberation Army is increasingly deploying sophisticated, indigenously built unmanned aerial vehicles, like GJ-1, GJ-2, WZ-7, and WZ-8, into its military, primarily for ISR purposes.

On the other hand, India is also investing in the development of indigenous military tactical UAV programs, despite the fact that the country is currently reliant on countries like Israel for tactical UAVs for military purposes. To satisfy the demand of India's armed forces, Indian-based R&D organizations, such as Hindustan Aeronautics Limited (HAL) and Defence Research and Development Organisation (DRDO), are developing UAVs with ISR, targeting, and weapon guidance capabilities, like Rustom and Netra. Likewise, Japan is also planning to develop and deploy its own unmanned surveillance aircraft before 2030. Such focus on developing tactical UAVs indigenously is expected to enhance the market prospects in the region during the forecast period.

China Held Highest Shares in the Market

China held the highest shares in the market and is expected to continue its domination during the forecast period. The growth is attributed to the increasing focus on enhancing defense capabilities and the rising development of advanced tactical UAVs. According to the Stockholm International Peace Research Institute (SIPRI) report published in 2022, China was the second largest defense spender in the world and largest in the Asia-Pacific, with a defense budget of USD 293 billion. The country of China, in recent times, has witnessed significant growth in terms of tactical UAVs as well as are engaged in developing various tactical UAVs to be used for combat purposes as well as for carrying out various other military activities. There has been an increasing trend in terms of UAV development by the People's Liberation Army in recent times.

Over the years, China has emerged as a global leader in terms of UAV development. Additionally, the country is continuing to advance in terms of UAV technological development, and it is expected to play a major role in the UAV industry trends. The Chinese ground force has a number of UAVs that are primarily smaller, more tactical models, and they are often used for battlefield reconnaissance and targeting artillery to improve the precision of strikes. A significant proportion of these are part of a series produced by the Xian Aisheng Technology Group. The tactical UAVs of the country include BZK-005 or Changying, ASN-209 or Silver Eagle, WZ-9 or Soaring Dragon, EA-03, JWP-02, and the ASN series.

Also, rising political tensions between neighboring countries, growing tensions between China-Taiwan and China-India, and rising cross conflicts lead to the strengthening of defense capabilities, which in turn drive the market growth.

Asia-Pacific Tactical UAV Industry Overview

The Asia-Pacific tactical UAV market is moderately consolidated due to the presence of a few players holding significant shares in the market. Some of the key players in the market are Elbit Systems Ltd, IAI, General Atomics, The Boeing Company, and Northrop Grumman Corporation. Key OEMs are focusing on integrating technologies like artificial intelligence (AI), stealth, hypersonic propulsion, advanced electronic warfare capabilities, and better avionics into the existing systems to further enhance the capabilities of tactical UAVs. This will help them gain new contracts, thereby propelling their growth during the forecast period. Globally renowned tactical UAV manufacturers are partnering with the local players to develop new tactical UAVs. For instance, in June 2023, the Defense Research Development Organization (DRDO) in India announced that the tactical aerial platform for advanced surveillance (TAPAS) 201 designed and developed by Bengaluru-based Aeronautical Development Establishment (ADE) is ready for user evaluation trials.

Additional Benefits:

- The market estimate (ME) sheet in Excel format
- 3 months of analyst support

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