

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

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Report description:

The Europe Tactical UAV Market size is estimated at USD 1.45 billion in 2024, and is expected to reach USD 2.72 billion by 2029, growing at a CAGR of greater than 13.31% during the forecast period (2024-2029).

Key Highlights

- In recent years, Europe has witnessed a number of cross-border conflicts, including the ongoing Russia-Ukraine war and increasing terrorist activities, which have led to rising defense spending from European countries. This increase in expenditure is directed towards the procurement of advanced weapons systems and the adoption of next-generation tactical drones, driving market growth.
- Furthermore, the pace of technological advancements and trends in newer-generation tactical UAVs is unlikely to slow down, indicating accelerating growth in the coming years. Real-time information is poised to become the most powerful weapon for warfighters, commanders, and troops in critical military missions, enabling them to protect themselves. Consequently, tailoring responses to threats necessitates superior tactical intelligence, surveillance, and reconnaissance, thereby generating demand for tactical UAVs from armed forces worldwide.
- Several UAV manufacturers are developing newer generation tactical UAVs equipped with advanced payloads, such as electro-optical or infrared sensors, capable of transmitting live video and other invaluable information to empower troops. However, security issues and the misuse of UAVs for criminal activities hinder market growth.

Europe Tactical UAV Market Trends

Military Segment Will Showcase Significant Growth During the Forecast Period

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- The increasingly diverse military applications and the requirement for highly effective and objective surveillance and reconnaissance for some of the most critical military applications are driving the highest demand from the military applications segment of the market. With increasing global unrest due to the ongoing conflicts between major global military superpowers, several militaries are focusing on expanding the fleets of their tactical UAVs to counter any adversary actions from enemies successfully. Furthermore, growing expenditure of the defense sector from Russia, Germany, the United Kingdom, France, and others and increasing use of UAVs for combat operations boost the market growth.
- Tactical UAVs are critical to ensure uninterrupted surveillance at the borders. Due to its diverse application profile, the demand for tactical UAVs has witnessed a multifold increase during the last decade. Hence, several procurements are underway or being placed to cater to the increased demand from global military forces.
- For instance, in October 2023, Rheinmetall AG received a contract worth EUR 200 million (USD 210 million) to deliver Luna NG reconnaissance drone systems to the German Army. Under the contract, the company will deliver a total of 13 systems, including a pilot system, in the second quarter of 2025.
- The contract includes spares and training support. Also, in May 2022, Switzerland announced it had received the first two of six Elbit Systems' Hermes 900 unmanned aerial systems from Israel. The country will receive four other drones by the end of 2023. Such developments will drive the market growth in the coming years.

United Kingdom is Expected to Show Highest Growth During the Forecast Period

- The UK government is significantly investing in enhancing its defense capabilities due to the growing security threats from Russia towards NATO countries, cross-border conflicts, and the ongoing war between Russia and Ukraine. According to the Stockholm International Peace Research Institute (SIPRI) report published in 2022, the UK ranked as the sixth-largest defense spender globally and the second largest in Europe, allocating a defense budget of USD 68.5 billion.
- Moreover, there has been a recent surge in tactical unmanned aerial vehicles (UAVs) within the United Kingdom. Currently, the UK operates a drone fleet consisting of ten Reaper drones, with plans to replace this existing fleet in the upcoming years. SIPRI's data indicates that the United Kingdom stands among the largest drone importers globally, having procured three MQ-9 Reaper drones from the United States and 55 'Watchkeeper' drones from Israel over the past few years.
- The British military has extensively utilized tactical UAVs in Iraq and Afghanistan, experiencing the loss of nearly 450 UAVs in five years. The Ministry of Defense attributes the loss of these drones to factors such as pilot error, technical faults, or the challenges of retrieval from hostile areas. Consequently, this surge in losses has generated substantial demand for new advanced UAVs in the UK over the last 5 years.

Europe Tactical UAV Industry Overview

The Europe tactical UAV market is semi-consolidated in nature, with a presence of few local and global players holding significant shares in the market. Some of the key players in the market are Leonardo S.p.A., The Boeing Company, AeroVironment Inc., Safran, and Israel Aerospace Industries Ltd. In Europe, there are growing collaborations between players from various nations for the development of advanced tactical UAVs.

For instance, Airbus, Dassault Aviation, and Leonardo are developing the European Medium Altitude Long Endurance Remotely Piloted Aircraft System (MALE RPAS), a twin-turboprop MALE UAV, for Germany, France, Italy, and Spain. The UAV will be introduced in 2025. Players are focusing on integrating advanced technologies, like artificial intelligence, stealth, advanced electronic warfare capabilities, and better avionics, into the existing systems to further enhance the capabilities of tactical UAVs.

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This will help the companies gain new contracts, thereby propelling their growth during the forecast period.

Additional Benefits:

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

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