2026 UAS SUPPLY CHAIN READINESS REPORT

Oklahoma's Opportunity in the Domestic Drone Manufacturing Revolution

Prepared by OK Autonomous
Tulsa, Oklahoma · 2026 · ok-as.com

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Executive Summary

The United States is on the verge of a fundamental transformation in how it manufactures, deploys, and sustains unmanned aerial systems (UAS). Driven by escalating DoD procurement requirements, the rise of the Replicator initiative, FAA integration milestones, and explosive commercial drone adoption across agriculture, energy, construction, and logistics, domestic demand for UAS components is projected to reach unprecedented levels between 2026 and 2030.

Oklahoma is positioned to capture a meaningful share of this opportunity — but only if its manufacturers move now.

This report maps the full landscape: the demand signals coming from defense and commercial sectors, the bill of materials (BOM) and supply chain pressures that represent both risk and opportunity, the certification pathways that unlock high-value contracts, and the specific areas where Oklahoma manufacturers are best positioned to compete and win.

KEY FINDING

The domestic UAS supply chain has a critical gap between surging OEM demand and qualified, credentialed domestic suppliers — particularly for precision machined structures, composite airframe components, power systems, and ground control hardware. Oklahoma manufacturers in aerospace, CNC machining, and advanced composites are directly in the path of this demand wave.

Metric	2024 Baseline	2026 Projection	2030 Projection
US DoD UAS Procurement Budget	$2.6B	$4.1B	$8.5B+
Commercial UAS Market (US)	$6.4B	$11.2B	$27.8B
Domestic UAS Supplier Firms	~320	~500 (target)	~900 (target)
NDAA-compliant UAS demand	Emerging	Strong	Dominant
OK Manufacturer Opportunity Window	Open	Prime	Competitive

SECTION 1: THE DEMAND LANDSCAPE

1. The Demand Landscape: Defense & Commercial Convergence

1.1 Department of Defense: Replicator and the Scale Imperative

The single most consequential demand signal in the UAS market today is the Pentagon's Replicator initiative, announced in August 2023 and operationally accelerating through 2026. Replicator's stated goal — fielding thousands of autonomous systems in 18–24 months — has fundamentally reframed how defense planners think about UAS procurement.

Rather than acquiring a small number of expensive, exquisitely capable platforms, the DoD is now pursuing attritable, mass-producible autonomous systems: small, capable, affordable enough to be expended in contested environments. This is not a niche program. It is a structural shift in how America intends to fight — and it requires an industrial base capable of producing at scale.

REPLICATOR IMPACT ON SUPPLY CHAIN

The shift to attritable, mass-produced UAS means defense buyers are no longer just evaluating platform capability — they are evaluating industrial capacity. Can a supplier deliver 500 units in 90 days? 5,000 in 12 months? This changes the qualification criteria, and it changes the opportunity for manufacturers who can demonstrate volume capability.

Key defense demand drivers through 2026–2030:

- Replicator Phase I & II: Targeting thousands of Group 1–3 UAS (under 55 lbs up to 1,320 lbs) for rapid fielding. Initial focus on small loitering munitions and ISR platforms, expanding to logistics and EW-capable systems.
- NDAA Section 848 / Blue UAS Framework: Mandating DoD procurement shift away from Chinese-manufactured UAS and components (DJI, Autel). Creates immediate demand for NDAA-compliant alternatives — directly benefiting domestic suppliers.
- Army's Short Range Reconnaissance (SRR) Program: ~9,000 small UAS contracted, with ongoing follow-on buys. Suppliers of composite frames, battery systems, and optical gimbals are in high demand.
- Navy / USMC Unmanned Surface and Aerial Integration: Expanding carrier-launched and ship-launched UAS programs requiring ruggedized, saltwater-resistant component specifications.
- SOCOM Demand: Special operations community driving demand for man-portable, rapidly deployable UAS with precision payloads — small-batch, high-specification manufacturing.
- Counter-UAS (C-UAS) Ecosystem: Explosive growth in detect-and-defeat systems creates parallel demand for RF components, radar subsystems, and hardened ground control hardware.

1.2 Commercial Sector: Five Industries Driving Demand

On the commercial side, five industries are converging to create sustained, growing UAS demand through 2030:

Agriculture

Precision agriculture is the largest near-term commercial UAS market. Crop spraying, planting, NDVI mapping, and livestock monitoring are driving rapid adoption of fixed-wing and multirotor platforms across the American agricultural heartland — directly relevant to Oklahoma's geography. The USDA's support for precision ag drone adoption through grant programs is accelerating purchase cycles for smaller farming operations.

- ~$4.8B projected US agricultural UAS market by 2028
- High-volume demand for ruggedized spray booms, large-capacity liquid tanks (10–30L), corrosion-resistant structural components
- Oklahoma's role: Significant agricultural land base creates both buyer opportunity and local manufacturing credibility

Energy & Utilities

Pipeline inspection, powerline monitoring, wind turbine inspection, and flare stack analysis are core drone use cases for oil & gas and utility operators. Oklahoma's energy sector is both a buyer and a potential source of manufacturing demand. Thermal imaging payloads, gas detection sensors, and long-endurance airframes are the key BOM items in demand.

- Chevron, BP, Williams Companies, and ONE Gas all active UAS programs
- FAA BVLOS (Beyond Visual Line of Sight) rule implementation in 2024–2026 unlocking pipeline corridor inspection at scale
- Oklahoma opportunity: Energy sector relationships + CNC machining capability for sensor housings and mounting systems

Construction & Infrastructure

Site surveying, progress monitoring, safety inspections, and volumetric analysis using photogrammetry and LiDAR are now standard on major construction projects. The Infrastructure Investment and Jobs Act (IIJA) has created hundreds of billions in infrastructure spending, with drone services embedded in project workflows across bridge, road, and dam projects.

- Demand for precision LiDAR mounts, camera gimbal systems, and ruggedized payload enclosures
- Contractor-grade durability requirements — relevant to Oklahoma metal fabrication and machining

Logistics & Last-Mile Delivery

Amazon Prime Air, Wing (Alphabet), Zipline, and Flytrex have all received FAA operational approvals for drone delivery. This segment is still early but represents the highest-volume, highest-scale commercial opportunity — platforms must be manufactured in the tens of thousands, components must be repeatable and affordable. Delivery drones will become the first true mass-manufactured UAS product.

- Airframe structural components, landing gear, weather-resistant enclosures at consumer electronics scale
- Supply chain must support continuous improvement cycles — aerospace-style quality at consumer manufacturing volume

Public Safety & Emergency Response

First responder drone programs are expanding in every major US city. FEMA, state emergency management, law enforcement, and fire departments are all deploying UAS for situational awareness, search & rescue, and damage assessment. This is a recurring procurement market with municipal and state budget cycles.

- Ruggedized enclosures, waterproofing, thermal payload mounts
- Oklahoma emergency management opportunity: OMES, OHP, local fire departments as reference customers

SECTION 2: BILL OF MATERIALS & SUPPLY CHAIN ANALYSIS

2. UAS Bill of Materials: Where Oklahoma Fits

A typical Group 1–3 UAS (the primary defense and commercial sweet spot) consists of 8 major subsystem categories. We analyze each for domestic supply chain gaps, demand outlook, and Oklahoma manufacturing relevance.

2.1 Airframe & Structural Components

The airframe is the primary manufacturing opportunity for traditional aerospace and machining suppliers. It is where Oklahoma's CNC, composites, and metal fabrication capabilities are most immediately relevant.

Component	Materials	Oklahoma Fit	Demand Outlook
Fuselage/body panels	Carbon fiber, fiberglass, aluminum	HIGH	Strong — volume scaling
Wing spars & ribs	Carbon fiber, aluminum 6061/7075	HIGH	Strong — defense & commercial
Boom arms (multirotor)	Carbon fiber tubes, aluminum CNC	HIGH	Very strong — Replicator effect
Landing gear	Aluminum, titanium, PEEK	MEDIUM	Moderate — varies by platform
Motor mounts	Aluminum CNC, carbon fiber	HIGH	Strong — high volume
Payload bays/enclosures	Aluminum, ABS, PC, PETG	HIGH	Very strong — sensor diversity
Fasteners & hardware	Titanium, stainless, A286	MEDIUM	Steady — consumable

CRITICAL SUPPLY CHAIN GAP

Domestic suppliers of certified carbon fiber composite structures for UAS airframes are severely limited. Most carbon fiber supply originates from Japan (Toray, Teijin) and fabrication has historically been offshore. Oklahoma manufacturers who invest in composite layup and autoclave capability now have a 2–3 year first-mover window before this gap closes.

2.2 Propulsion Systems

This is the single largest domestic supply chain gap in the UAS BOM. The overwhelming majority of brushless motors, ESCs (electronic speed controllers), and propellers for commercial UAS are manufactured in China — specifically by firms including T-Motor, SunnySky, DJI, and Hobbywing. NDAA restrictions are forcing a rapid redesign of procurement strategies across the industry.

- Brushless DC Motors: Rare earth magnets (predominantly Chinese-sourced neodymium) are the core bottleneck. US motor manufacturers (Joby, Joby supplier ecosystem, Allied Motion, Maxon) are scaling but remain constrained by magnet availability and winding labor costs.
- Electronic Speed Controllers (ESCs): Highly integrated PCBs with mixed US/Asian semiconductor content. ITAR considerations for military-grade ESCs create a premium market for domestic producers.
- Propellers: High-performance UAS props are predominantly carbon fiber, injection-molded or machined. This is an addressable Oklahoma opportunity — CNC machining of aluminum or carbon fiber props for defense applications.
- Battery Systems (LiPo/Li-Ion): Cells remain predominantly Asian (CATL, Samsung SDI, LG Chem). However, battery management systems (BMS), packs, and integration are areas where domestic value-add is growing rapidly.
- Fuel Cell & Hydrogen Systems: Emerging for extended endurance platforms. Intelligent Energy (UK), Ballard Power, and HyPoint are developing US supply chains — early opportunity for precision machined pressure vessels and thermal management components.

OKLAHOMA OPPORTUNITY — PROPELLERS

Precision-machined aluminum and composite propeller blades for defense UAS represent a direct opportunity for Oklahoma CNC machining firms. Defense-grade props require tight geometric tolerances (±0.001"), balance verification, and material traceability — exactly the capability profile of AS9100-certified Oklahoma manufacturers.

2.3 Avionics, Flight Control & Navigation

Flight controllers, GPS/GNSS receivers, inertial measurement units (IMUs), and autopilot systems represent the highest-value, most technically complex segment of the UAS BOM. This is also the most ITAR-sensitive and cybersecurity-regulated area.

- Flight Controllers: ArduPilot and PX4 open-source stacks dominate commercial. Military-grade systems (Piccolo, SkyController, Kestrel) are US-manufactured. Cube module (ProfiCNC, Australian) widely used.
- GPS/GNSS: u-blox (Swiss), Trimble, NovAtel (Hexagon, Canadian) lead precision navigation. Anti-spoofing and anti-jamming capabilities increasingly required for defense.

- IMUs: Bosch, InvenSense (TDK), Analog Devices dominate. MEMS manufacturing is a semiconductor-adjacent capability not currently in Oklahoma's profile.
- Datalinks: Microhard, Silvus Technologies, and Persistent Systems provide US-made tactical mesh radios. Ground data terminals and antenna systems represent Oklahoma electronics assembly opportunity.
- Ground Control Systems (GCS): Ruggedized laptop/tablet enclosures, antenna mounts, and case systems for GCS are a near-term addressable market for Oklahoma precision manufacturers.

2.4 Sensors & Payload Systems

Payload diversity is accelerating — EO/IR cameras, multispectral sensors, LiDAR, SAR (synthetic aperture radar), chemical detection, and communications relay packages are all active procurement categories. The payload often exceeds the airframe value on high-end platforms.

Payload Type	Key Suppliers	BOM Opportunity for OKA Mfgs	ITAR?
EO/IR Gimbals	FLIR/Teledyne, L3Harris, DRS	Precision machined gimbal structures, motor mounts	Yes (military grade)
Multispectral	MicaSense, Sentera, Parrot	Payload enclosures, connector hardware	No
LiDAR	Velodyne (Ouster), Livox, Quanergy	Precision mounting plates, vibration isolation	Limited
SAR	Capella, IMSAR, General Atomics	RF enclosures, precision structures	Yes
Chemical/Gas Detection	Aeroqual, Honeywell, SpectraSensors	Sensor housings, sampling probes	No
Communications Relay	Silvus, Persistent Systems	Antenna mounts, RF enclosures	Varies

2.5 Ground Support Equipment (GSE)

Often overlooked in supply chain analysis, GSE represents a substantial and growing market that is almost entirely domestic in character. Charging stations, transport cases, launch/recovery systems, maintenance tooling, and calibration equipment must all be produced and supported domestically for defense programs.

- Ruggedized transport and storage cases: Pelican-style, custom foam-insert cases for UAS systems — addressable by Oklahoma fabrication and light manufacturing firms
- Field charging and power management systems: Custom power electronics enclosures, battery management racks — precision sheet metal and aluminum fabrication opportunity

- Launch and recovery systems (LARS): Catapult and net recovery systems for fixed-wing tactical UAS — structural fabrication, cable systems, pneumatics
- Maintenance and calibration tooling: Jigs, fixtures, and test stands for UAS depot maintenance — a natural fit for Oklahoma's existing tooling and fixture makers

SECTION 3: SUPPLY CHAIN BOTTLENECKS & RISKS

3. Critical Bottlenecks & Risks

3.1 The China Dependency Problem

The UAS industry's exposure to Chinese-manufactured components is its most significant structural vulnerability — and its most significant commercial opportunity for domestic suppliers. Current estimates suggest that 70–80% of the commercial UAS supply chain by component count has meaningful Chinese content, including:

Component Category	China Dependency	Domestic Alternative Availability	Urgency
Brushless motors	**CRITICAL (~85%)**	Emerging — 18–36 month scale-up	**URGENT**
Rare earth magnets (NdFeB)	**CRITICAL (~90%)**	Limited — MP Materials (CA) scaling	**URGENT**
LiPo battery cells	**HIGH (~75%)**	Some US options at premium	**HIGH**
Carbon fiber (raw)	**HIGH (~60%)**	Hexcel, Solvay (US) at premium	**HIGH**
Flight controller chips	**MEDIUM (~40%)**	TSMC (US fab expanding)	**MODERATE**
Airframe structures	**MEDIUM (~35%)**	Growing domestic capacity	**ADDRESSABLE**
Precision machined parts	**LOW–MED (~25%)**	Strong US base, needs scaling	**ADDRESSABLE**
Electronic assemblies (PCBs)	**HIGH (~65%)**	Limited short-term	**HIGH**

3.2 The Rare Earth Magnet Bottleneck

The single most acute supply chain vulnerability in the UAS propulsion ecosystem is the dependence on Chinese-processed rare earth elements — specifically neodymium, praseodymium, and dysprosium — for permanent magnet motors. China controls approximately 60% of global rare earth mining and over 85% of processing capacity.

For the Replicator initiative and broader DoD UAS procurement to succeed, this bottleneck must be addressed. Current mitigation efforts include:

- MP Materials (Mountain Pass, CA): The only operating US rare earth mine and processing facility. Expanding magnet production through 2025–2026. Still at a fraction of required defense capacity.
- DoD Defense Production Act (DPA) investments: Multiple Title III investments in domestic rare earth processing and magnet manufacturing. Creating opportunities for domestic magnet suppliers over a 3–5 year horizon.
- Motor design innovation: Some OEMs (Joby Aviation, Beta Technologies) are investing in wound-rotor or switched-reluctance motor designs that reduce rare earth dependency — but remain early-stage.

IMPLICATION FOR OKLAHOMA

Oklahoma manufacturers cannot directly solve the rare earth bottleneck — but they can position as the downstream beneficiary. As domestic motor manufacturers scale (whether in Oklahoma or nationally), they will need local precision machined housings, stators, end caps, and integration fixtures. Being the qualified, proximate supplier for motor sub-assemblies is a strategic position worth pursuing now.

3.3 Regulatory & Certification Bottlenecks

Beyond component availability, the most significant barrier preventing Oklahoma manufacturers from winning UAS contracts today is certification. Defense and aerospace-grade UAS buyers require formal quality management credentials before qualifying a new supplier. The primary certifications relevant to this market are:

Certification	Required For	Time to Achieve	Cost Estimate
AS9100 Rev D	All defense & aerospace UAS work	9–18 months	$25K–$80K
ITAR Registration	Any defense-related component	30–90 days (DoS)	$2,500 (registration)
CMMC Level 2	DoD contracts with CUI	12–24 months	$50K–$200K
ISO 9001:2015	Commercial UAS, minimum baseline	6–12 months	$15K–$40K
NADCAP	Special processes (welding, NDT, coatings)	12–24 months	$20K–$60K per process
FAA Production Approval (PAH)	FAA-certificated UAS components	12–36 months	$50K–$150K

Many Oklahoma SMMs are ISO 9001 certified but have not yet pursued AS9100. This single certification gap is the most common reason a qualified manufacturer is not eligible for defense UAS contracts. OK Autonomous advises all manufacturing partners to prioritize AS9100 Rev D as the highest-ROI certification investment they can make in 2026.

SECTION 4: OKLAHOMA'S COMPETITIVE POSITION

4. Oklahoma's Competitive Position

4.1 Existing Strengths

Oklahoma enters this market with a foundation that few states can match in the combination of aerospace heritage, manufacturing capacity, workforce, and emerging innovation infrastructure:

- **Oklahoma has been an aerospace manufacturing state for 70+ years. American Airlines MRO (Tulsa), NORDAM Group, Spirit AeroSystems, L3Harris, and dozens of Tier 2–3 suppliers operate in the state. This means existing AS9100 infrastructure, experienced aerospace workforce, and buyer relationships.** Aerospace Heritage:
- **Northeast Oklahoma has a dense cluster of precision CNC machining shops — many already serving aerospace primes. These shops can pivot to UAS airframe components, motor housings, and payload structures with modest retooling.** CNC Machining Capacity:
- **TIL's active investment in the TARMAC Demonstration Center and OK Autonomous represents a rare institutional commitment to building the bridge between manufacturers and drone buyers. This kind of organized market access infrastructure gives Oklahoma SMMs an advantage that unaffiliated manufacturers in other states lack.** Tulsa Innovation Labs & Ecosystem:
- **Oklahoma's lower cost of labor, real estate, and operations relative to California, Massachusetts, or Texas coastal markets gives manufacturers a structural pricing advantage — especially important as attritable UAS programs pressure buyers to minimize unit cost.** Cost Structure:
- **Central US location minimizes shipping distances to defense installations (Tinker AFB, Fort Sill, Altus AFB, Vance AFB), agricultural markets, and energy sector buyers. Four of the five largest US oil & gas operators have Oklahoma operations.** Geographic Position:
- **OSU, OU, and Tulsa University are all investing in aerospace and autonomous systems programs. The OSU Smart Supply Chain program (on whose council OK Autonomous partner Brian Carpenter serves) is directly training talent for this sector.** University Pipeline:

4.2 Current Gaps to Address

Oklahoma must be clear-eyed about the gaps that exist between current capability and full UAS market readiness:

- **Carbon fiber and advanced composite fabrication capability in Oklahoma is limited. The state has sheet metal, aluminum machining, and some fiberglass capability, but autoclave-cured aerospace composite structures are underrepresented. This is the highest-priority capability gap to address.** Composite Manufacturing Depth:
- **Oklahoma has minimal printed circuit board assembly (PCBA) capability. This limits participation in avionics, ESC, and payload electronics manufacturing. Near-term, Oklahoma manufacturers should focus on mechanical and structural content and partner with electronics assemblers in Texas, Colorado, or nationally.** Electronics & PCB Assembly:
- **Much of Oklahoma's aerospace manufacturing heritage is in low-volume, high-precision MRO and component work. The emerging UAS market — especially for attritable platforms — will require manufacturers to demonstrate volume production capability. Investment in lean manufacturing, production flow design, and automation will be necessary.** Volume Manufacturing Experience:
- **Cybersecurity Maturity Model Certification (CMMC) Level 2 is increasingly required for DoD contracts involving Controlled Unclassified Information (CUI). Many Oklahoma SMMs have not begun CMMC readiness programs. This should be a parallel track alongside AS9100 certification efforts.** CMMC Readiness:
- **The most common gap for Oklahoma manufacturers is simply not being known to drone OEMs. This is the market access problem OK Autonomous was created to solve — but manufacturers must also invest in capability marketing, tradeshow presence, and direct engagement with OEM supply chain teams.** Direct OEM Relationships:

4.3 The First-Mover Advantage Window

The window for Oklahoma manufacturers to establish themselves as preferred UAS suppliers is open right now — but it will not stay open indefinitely. The domestic UAS supply chain will consolidate around qualified, credentialed, relationship-anchored suppliers over the next 24–36 months. Manufacturers who are qualified, visible, and actively engaged by mid-2026 will have a structural advantage that will compound over time.

This is the dam analogy that drives OK Autonomous's strategy. Patient investment in sales, certification, and relationship development now produces compounding returns as the market flood arrives.

SECTION 5: 2026 ACTION ROADMAP

5. The 2026 Action Roadmap for Oklahoma Manufacturers

5.1 Certification Priority Stack

If an Oklahoma manufacturer takes only one action in 2026, it should be initiating AS9100 Rev D certification. Here is the recommended sequencing:

Priority	Action	Timeline	Investment
1 — CRITICAL	Initiate AS9100 Rev D gap assessment and certification plan	Q1 2026	\$5K–\$15K (assessment)
2 — HIGH	Register with ITAR (State Dept.) — required for any defense inquiry	30–90 days	\$2,500
3 — HIGH	Begin CMMC Level 2 readiness assessment with registered C3PAO	Q2 2026	\$10K–\$30K (assessment)
4 — MEDIUM	Develop capability profile and UAS-specific marketing one-pager	Q1 2026	\$2K–\$8K
5 — MEDIUM	Attend AUVSI XPONENTIAL (May, Detroit) via OK Autonomous delegation	May 2026	Travel + OK Autonomous fee
6 — MEDIUM	Identify 3 target OEMs for direct outreach through OKA network	Q2 2026	Relationship investment

5.2 Target OEM Categories for Oklahoma Suppliers

Based on BOM analysis and supply chain gaps, Oklahoma manufacturers should prioritize outreach to these OEM categories in 2026:

- **Skydio, Joby, Shield AI, Firestorm Labs, Joby, Volansi, AeroVironment — actively building domestic supply chains for NDAA-compliant platforms. Seek airframe structural components, motor mounts, payload bays.** Small Tactical UAS Manufacturers (Group 1–2):

- **Hylio, Rantizo, XAG (working toward US production), Dragonfly, Yamaha RMAX — need domestic-sourced spray systems, tank components, boom structures. Strong Oklahoma alignment given agricultural base.** Agricultural Drone OEMs:
- **L3Harris, Textron, Kratos, Northrop Grumman UAS divisions — all have active UAS programs requiring Tier 2–3 domestic suppliers for structural and mechanical content.** Defense Prime Subcontractors:
- **Percepto, Airobotics, Avitas Systems (GE Vernova), Cyberhawk — ruggedized enclosures, sensor mounts, landing pads for autonomous inspection platforms.** Inspection & Energy UAS OEMs:
- **Dedrone, Fortem Technologies, D-Fend Solutions, Epirus — radar housing, antenna mounting, precision enclosures for ground-based C-UAS systems.** Counter-UAS System Integrators:

5.3 The OK Autonomous Role

OK Autonomous exists precisely to compress the timeline between Oklahoma manufacturers and qualified UAS buyers. Through the TARMAC Demonstration Center program and active tradeshow presence, OKA provides:

- Pre-qualified buyer introductions: OKA screens OEM supply chain needs and matches them to Oklahoma manufacturers with the right capability profile — eliminating cold outreach and reducing qualification timelines.
- Capability translation: We translate manufacturing specs into OEM-relevant value propositions — turning 'we do CNC aluminum machining to ±0.001" tolerances' into 'we are ready to supply your motor mount and payload bay components at AS9100 quality with 6-week lead times.'
- Trade show presence: OKA attends AUVSI XPONENTIAL, Military Robotics, Commercial UAV Expo, UTAC, and CES with scheduled OEM meetings — not badge scanning. Manufacturers partnered with OKA get introductions, not booth business cards.
- Certification navigation: We help manufacturers understand which certifications matter for their target OEM categories and connect them to trusted certification consultants.

SECTION 6: MARKET OUTLOOK & CONCLUSION

6. Market Outlook & Conclusion

6.1 Five-Year Revenue Opportunity for Oklahoma

Based on current procurement signals, BOM gap analysis, and Oklahoma's existing manufacturing footprint, we estimate the addressable revenue opportunity for Oklahoma UAS suppliers at:

Segment	2026 Est.	2028 Est.	2030 Est.	Key Drivers
Defense structural components	$8M–$15M	$25M–$50M	$60M–$120M	Replicator, SRR, SOCOM
Commercial agricultural UAS parts	$3M–$6M	$10M–$20M	$25M–$50M	Precision ag adoption
Ground support equipment	$2M–$4M	$6M–$12M	$15M–$30M	DoD depot, commercial ops
Energy/inspection components	$2M–$4M	$7M–$14M	$18M–$35M	BVLOS ops, pipeline
C-UAS hardware	$1M–$3M	$5M–$10M	$15M–$30M	Force protection demand
TOTAL OKLAHOMA OPPORTUNITY	**$16M–$32M**	**$53M–$106M**	**$133M–$265M**	Cumulative 5-year: $330M–$660M

These figures represent conservative-to-moderate estimates based on Oklahoma capturing 1–3% of the addressable domestic UAS manufacturing market for components where Oklahoma has demonstrated capability. States with established aerospace ecosystems (Arizona, Kansas, Ohio) will compete vigorously. The opportunity is real, but it requires organized, credentialed, well-connected action.

6.2 Conclusion

The conditions for Oklahoma's emergence as a UAS supply chain state are forming faster than most manufacturers realize. The demand is coming — from Replicator, from agricultural adoption, from energy sector deployment, from infrastructure inspection. The supply chain is broken in exactly the places where Oklahoma manufacturers can help fix it.

The question is not whether there will be a flood. The question is whether Oklahoma manufacturers will have the certifications, the relationships, and the market presence to capture their share of it when it arrives.

OK Autonomous was built to ensure the answer is yes.

NEXT STEP

If you received this report, OK Autonomous would like to schedule a 30-minute capability conversation to understand your current manufacturing profile, certification status, and target markets — and identify where OEM introductions make the most sense for your business in 2026. Contact us at info@ok-as.com or visit ok-as.com to get started.

Appendix: Key Industry Resources

Industry Associations

- AUVSI (Association for Unmanned Vehicle Systems International) — auvsi.org
- DRONEII / Drone Industry Insights — drone-industry-insights.com
- Small UAS Coalition — smalluascoalition.org
- FAA UAS Integration Office — faa.gov/uas

DoD & Government Programs

- Replicator Initiative — defense.gov/replicator
- Blue UAS Cleared List — DIU Blue UAS Framework — diu.mil
- NDAA Section 848 Compliance Resources
- Defense Production Act Title III — businessdefense.gov
- SBIR/STTR Programs for UAS — sbir.gov

Certification Bodies

- AS9100 Rev D — SAE International / IAQG — sae.org
- CMMC Accreditation Body — cybermaturitycertification.org
- NADCAP — PRI — pri-network.org

Oklahoma Resources

- Tulsa Innovation Labs — tulsainnovationlabs.com
- Oklahoma Manufacturers Alliance — okmanufacturers.com
- OAIRE (Oklahoma Aerospace Institute for Research & Education)
- Oklahoma Department of Commerce Advanced Manufacturing Division
- OSU Spears School — Smart Supply Chain Management Program

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This report was prepared by OK Autonomous for registered recipients. Market size estimates are based on publicly available industry data, DoD budget documents, and informed analysis. They are not guarantees of market performance.