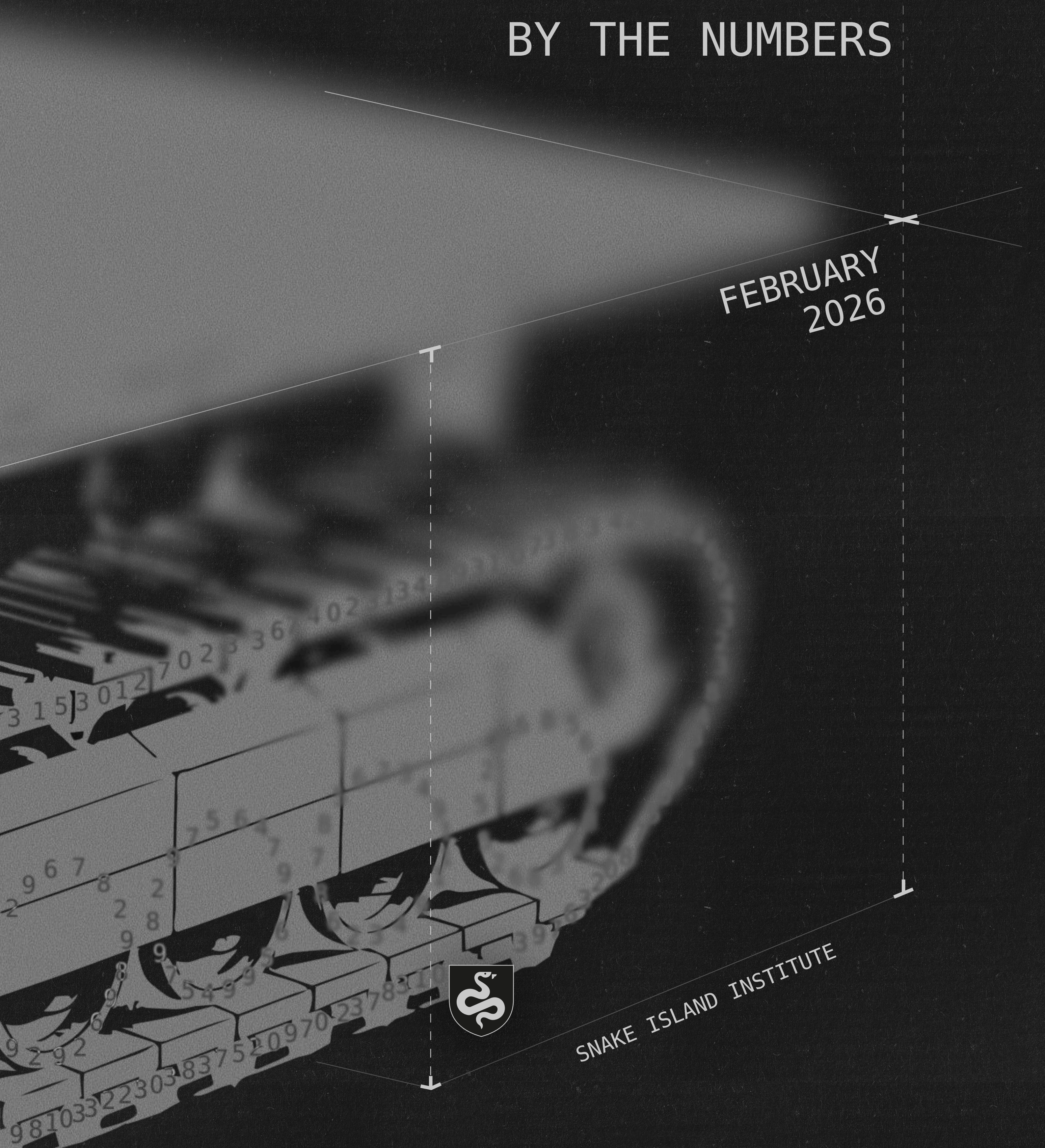
UKRAINE'S DEFENSE TECH INDUSTRY:

BY THE NUMBERS

FEBRUARY 2026



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A special thank you to our partners StrategEast Center for a New Economy for their contributions to shaping the foundation and structure of this report.

SNAKE ISLAND INSTITUTE

The Snake Island Institute is an independent defense analytics and coordination center established to strengthen the strategic partnership between Ukraine and its western allies in the security sector through:

ANALYTICS:

Advancing understanding of modern warfare and doctrine

ADVOCACY:

Aligning Ukrainian and western decision-makers

DEFENSE TECH:

Enabling integration of critical technologies into combat operations

You can find more on our website.

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Executive Summary

Since the full-scale Russian invasion of Ukraine in 2022, Ukraine's defense technology ecosystem has become one of the most dynamic innovation environments in the world. The industry now includes companies developing solutions from components and software to electronic warfare systems and unmanned aerial, ground, and maritime platforms.

Between 2022 and 2025, the number of defense tech companies grew from roughly a dozen to around 1,500, with the sector also demonstrating exceptional economic growth. Some of the largest companies reached revenues of up to $150 million in 2024, while firms operating before the full-scale invasion expanded revenues more than 100 times and increased their workforce by more than 25 times; this is no longer the "garage shop" industry that it once was. Ukraine has also seen a strong localization trend, with a rapidly emerging domestic market for components and political pushes for vertical integration.

The investment landscape has also shifted from predominantly angel investment at the start of the invasion to a more structured ecosystem involving venture capital and international funding, with total investment in the Ukrainian defense technology sector reaching approximately $129 million in 2025. Government procurement has also been a major growth driver, with state funding for weapons procurement and manufacturing increasing sixfold since 2022.

International cooperation has expanded significantly across multiple levels, including company partnerships, government-backed funding initiatives, and co-production programs, strengthening Ukraine's integration into global defense innovation and industrial networks.

In this report, we examine the structure of the current market and its capacity, including the distribution of companies operating across different technology segments. We also analyze the growth of production capacity, the battlefield use of systems, the investment ecosystem, public programs, and procurement mechanisms, as well as international initiatives and co-production efforts. The aim is to provide a high-level—though not fully comprehensive—overview of Ukraine's private defense technology sector as of February 2026, recognizing that some data is not publicly available due to the sensitivity of wartime activities.

We also acknowledge that a significant share of prototyping and improvement of effective systems takes place directly on the frontline by Ukrainian military units. Much of this work remains non-public and difficult to capture in open-source analysis. Nevertheless, these frontline-driven innovations play a critical role in shaping the development of Ukraine's defense technologies and the broader ecosystem described in this report.

Methodology

This report is based on an analysis of open-source information, including publicly available government reports, industry publications, investment announcements, and verified media sources. The research also incorporates publicly disclosed statements from companies, defense innovation platforms, and international partner initiatives.

Due to the sensitive nature of defense technologies and the ongoing war, a significant share of data related to specific capabilities, production volumes, and company operations is not publicly disclosed. Certain manufacturers and projects intentionally limit information sharing for operational security reasons. As a result, sections of this report that reference leading companies, investment deals, or production capacity may be skewed toward entities that operate publicly or disclose information voluntarily.

The purpose of this report is not to promote or endorse any specific company or product. Instead, it aims to provide a high-level analytical overview of the Ukrainian defense technology market.

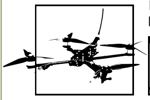
Ukrainian Defense Tech Structure

AERIAL SYSTEMS

STRIKE

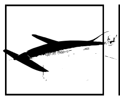
Designed to destroy a target.
Often carry a warhead integrated into the airframe and eliminate the target by impacting it directly, which makes them single-use systems. Multirotor platforms are usually significantly cheaper and carry smaller warheads, while fixed-wing designs are larger and more powerful. The category also includes deep-strike systems intended for long-range, strategic, autonomous attacks, as well as interceptor drones designed to engage and destroy enemy UAVs and missiles.

FPV QUADCOPTERS

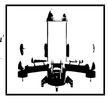


FIXED-WING LOITERING MUNITIONS

LONG-RANGE

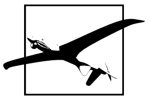


INTERCEPTORS



ISR

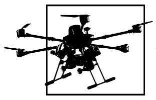
Designed to collect intelligence.
Reconnaissance platforms are equipped with optical, thermal, and sometimes signals-intelligence sensors to observe, track, and identify targets in real time.



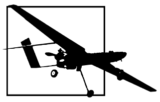
MULTIPURPOSE

Serve as platforms for mounting combat or mission payloads to perform a wide range of tasks, including strikes, logistics, reconnaissance, and other specialized missions.

MULTIROTOR



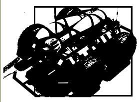
FIXED-WING



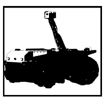
GROUND SYSTEMS

Used for a wide range of military and support purposes across the battlefield. Include logistic UGVs for resupply and casualty evacuation, strike UGVs armed to engage enemy targets, and multipurpose platforms capable of tasks such as reconnaissance, mining and demining, engineering support, and other specialized missions. UGVs are built on different mobility platforms, including wheeled, tracked, hybrid wheel-track systems, and even legged designs, each optimized for specific terrain and operational requirements. Their size and payload capacity vary significantly depending on mission needs, ranging from very small systems weighing only a few kilograms to heavy UGVs weighing several tons.

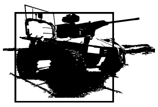
MULTIPURPOSE



LOGISTIC



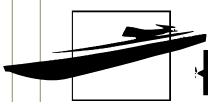
STRIKE (RWS)



NAVAL SYSTEMS

Divided into surface systems (unmanned surface vessels, USVs) and underwater systems (unmanned underwater vehicles, UUVs). Some are designed as one-time-use, kamikaze platforms intended to destroy targets through direct impact. Reusable naval systems are commonly used not only for strike missions, but also for surveillance, logistics, mine laying, and other maritime tasks.

SURFACE

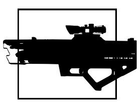


UNDERWATER

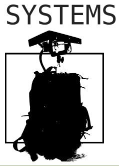
ELECTRONIC WARFARE

Used either to actively counter enemy drones by jamming control links, navigation signals, or data transmission. EW systems are fielded in several form factors, including personal systems, anti-drone rifles, trench-based operational systems, and vehicle-mounted systems, each adapted to different tactical needs.

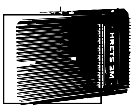
ANTI-DRONE RIFLES



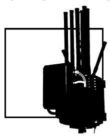
PERSONAL SYSTEMS



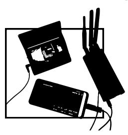
TRENCH-BASED OPERATIONAL SYSTEMS



VEHICLE-MOUNTED SYSTEMS

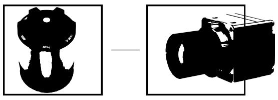


SIGNALS INTELLIGENCE



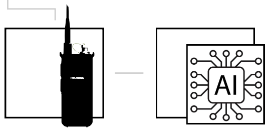
COMPONENTS

Due to supply chain dependencies on China, as well as the insufficient speed of international suppliers in responding to frontline needs, Ukraine has recently seen rapid growth in the market for unmanned systems components. Companies have emerged that manufacture motors, cameras, flight controllers, communications equipment, and other critical components.

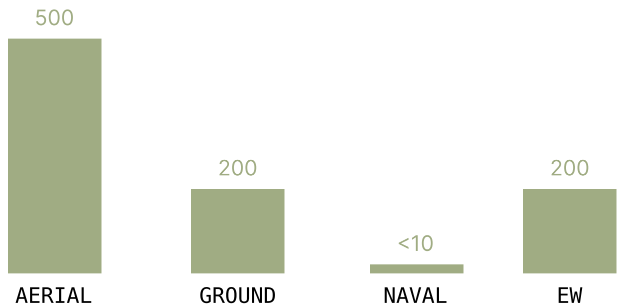


COMMUNICATIONS, SOFTWARE, AI, AND OTHER

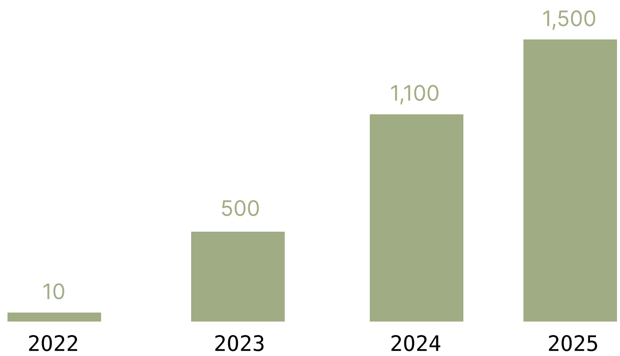
Encompasses technologies that enable data exchange, battlefield coordination, decision-making, and advanced automation. This includes secure communications networks, mission planning and analytics software, and AI-powered systems for autonomous navigation, targeting, and threat detection.



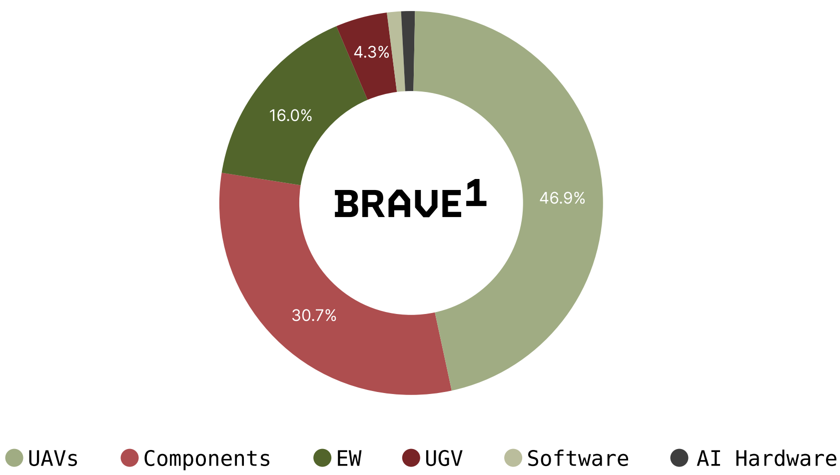
NUMBER OF COMPANIES BY SYSTEM TYPE[1]



NUMBER OF COMPANIES OVER TIME[2]



PRODUCT COMPOSITION OF THE BRAVE1 MARKET[3]



1. Sources: Fedorov, RBC-UKRAINE (Fedorov).
2. Sources: dev.ua (citing Fedorov), Forbes, Diia.City United, The Strategist.
3. Source: Brave1.
4. This table was compiled by combining available revenue data with media overviews of the largest companies. Some companies may have had higher revenue than those listed but were not included due to limited publicly available information.
5. Sources: Opendatabot, The Kyiv Independent, Forbes.

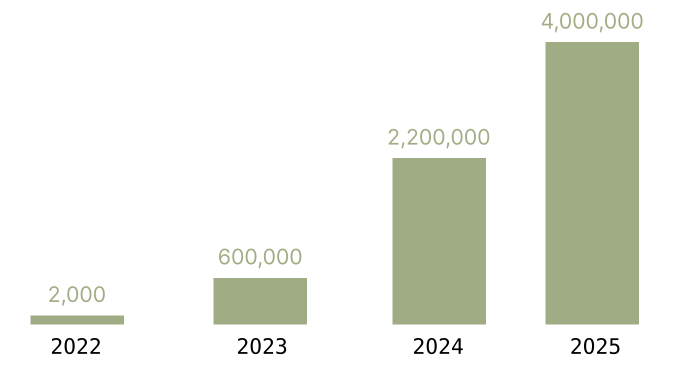
Aerial systems

BIGGEST COMPANIES BY 2024 REVENUE[4,5]

	COMPANY	SYSTEMS	KEY PRODUCTS	REVENUE (2024)	EMPLOYERS (2024)
	Deviro	Fixed-wing loitering munition and ISR	Leleka, Bulava	$180m	439
	Screentech	Heavy bombers, FPV, fixed-wing ISR	Lasar, LF-240, L-10	$155m	243
	Taf Industries	FPV, EW, Repeaters, Fixed-wing ISR, components	Kolibri, Babka	$130m	71
	Ukrspecsystems	Fixed-wing ISR, components	PD-2, Shark	$124m	1075
	Fire Point	Long-range, cruise missile	FP-1, FP-2, FP-5 Flamingo	$103m	429
	Athlon Avia	Fixed-wing loitering munition and ISR	Furia, Silent Thunder	$80m	214
	Skyeton	Fixed-wing ISR	Raybird	$77m	330
	Gurzuf Defence	Heavy bombers	Heavy Shot	$29m	111
	Airlogix	Fixed-wing ISR	GOR	$24m	200
	Vyriy	FPV, Fixed-wing loitering munition, Signal repeaters	Vyriy 10, Mara Pro, Blyskavka	$23m	58

4. This table was compiled by combining available revenue data with media overviews of the largest companies. Some companies may have had higher revenue than those listed but were not included due to limited publicly available information.
5. Sources: Opendatabot, The Kyiv Independent, Forbes.

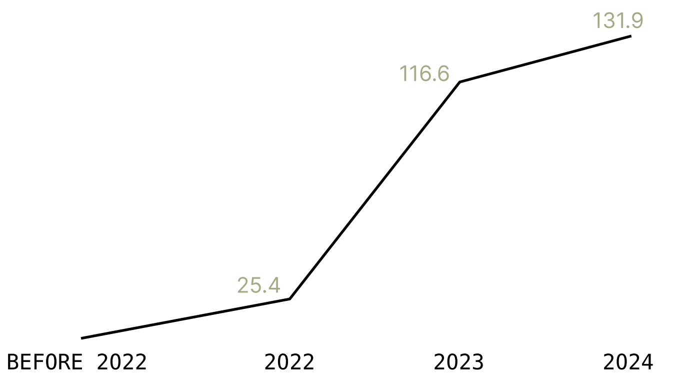
ESTIMATED NUMBER OF UAVS PRODUCED[6]



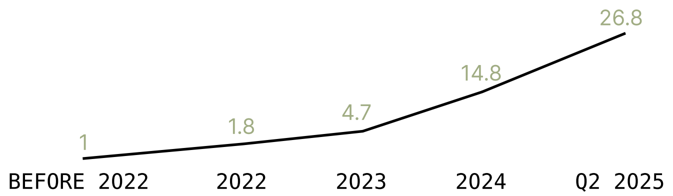
AVERAGE COST OF UAVS[7]

FPV	$500
FPV with thermal camera	$1000
Interceptor	$1300-$2100
Heavy bomber	$15000-$25000
Fixed-wing ISR	$20000-$40000

ESTIMATED ANNUAL REVENUE GROWTH (PRE-2022 BASELINE)[8]



ESTIMATED ANNUAL EMPLOYEE GROWTH (PRE-2022 BASELINE)[9]



BETWEEN JUNE 1, 2025, AND FEBRUARY 17, 2026,
THE UNMANNED SYSTEMS FORCES STRUCK[10]:

Military personnel	64794
Fixed-wing UAVs	8656
Shaheds / Gerbera	3901
Tanks	653
Armoured Fighting Vehicles	1071
Self-Propelled Artillery	239
Artillery Systems	3444
MLRS, SAM, and AA systems	263

20-50%

FPV mission hit rate,
depending on operator experience[11]

>80%

of hits on Russian targets are caused by drones[12]

20%

Shahed shoot-downs are carried out
by interceptor drones.[13]

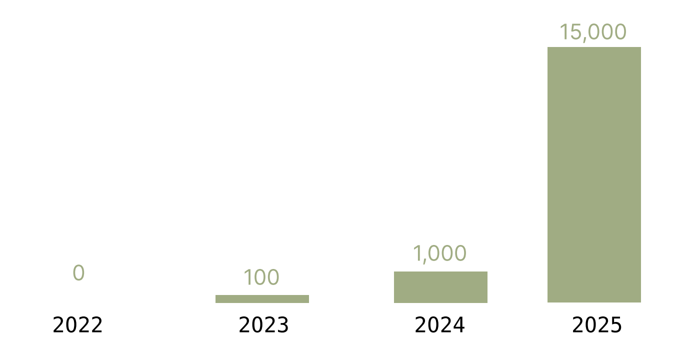
6. Sources: Slovo i Dilo, Georgetown University, Centre for Eastern Studies, Bloomberg.
7. Source: Brave1.
8. Source: Opendatabot.
9. Ibid.
10. Source: Unmanned Systems Forces.
11. Source: Swedish Defence Research Agency.
12. Source: Fedorov.
13. Source: Ukraine's Arms Monitor.

Ground systems

BIGGEST COMPANIES BY 2024 REVENUE[14]

	COMPANY	KEY PRODUCTS	REVENUE (2024)	EMPLOYERS (2024)
BUREVII	**BUREVII**	Ardal, Mangal	$3m	112
TENCORE	**Tencore**	TerMIT	$1.6m	99
Ratel Robotics	**Ratel Robotics**	Ratel-M, Ratel-S	$1.5m	38
SKY LAB	**Skylab UA**	Sirko-S1	$0.9m	11
DevDroid	**DevDroid**	Droid TW 12.7, Wolly	$0.6m	22
DROPLA	**Dropla Tech**	DROPLA UGV LOGIST 1.0	$0.5m	19
	Rovertech	GRCS "Zmiy"	$0.4m	5
TEMERLAND military solutions	**TEMERLAND**	Gnom-miner, Solomandra	$0.4m	27
ROBONEERS	**Roboneers**	RWS Saber, UGV Lynx,	$0.3m	14

ESTIMATED NUMBER OF UGVS PRODUCED[15]



$20,000-$30,000

Average Ukrainian UGV cost[16]

$300,000-$600,000

Average Western UGV cost[17]

90%

of UGVs were deployed for logistics and evacuation in 2025.[18]

14. Source: Opendatabot.
15. Sources: Army Technology, The Kyiv Independent.
16. Source: Brave1.
17. Sources: NV, Ken Research.
18. Source: Army Technology.

Naval systems

MANUFACTURERS

	MANUFACTURER	KEY PRODUCTS
	Undisclosed manufacturer (cooperating with the Security Service of Ukraine)	Sea Baby, Sub Sea Baby, Mamai
	Undisclosed manufacturer (cooperating with the Defense Intelligence of Ukraine)	Magura V5, Magura V7
	Military Armored Company HUB	Katran X1, Katran X2, Katran X3, Katran Venom
	Nordex	Seawolf
	Undisclosed manufacturer (cooperating with the Ukrainian Navy)	Barracuda 6, Barracuda 9
	Aquatechnic	Marichka
	Toloka	TLK-150, TLK-200, TLK-400, TLK-1000

USV PRICE ESTIMATES[19]

Sea Baby	$220,000
Magura	$270,000
Marichka	$400,000

~40
Russian vessels have been damaged or destroyed by Ukrainian USVs.[20]

For every $1 spent on USV operations in the Black Sea, on average **$40** of damage was inflicted on Russian infrastructure.[21]

19. Sources: United24, U.S. Naval Institute, Dev.ua.
20. Sources: Azov.one, Azov.one.
21. Source: Snake Island Institute.

EW systems

BIGGEST COMPANIES BY 2024 REVENUE[22,23]

	COMPANY	KEY PRODUCTS	REVENUE (2024)	EMPLOYERS
	Kvertus	Kvertus AD Kraken, AD Cerberus, LTEJ Mirage	$53.5m	151
PROXIMUS	**Proximus**	Bukovel-AD	$32.8m	85
UNWAVE	**Unwave**	Shatro, Boombox, Bashur	$26.5m	78
HYMO	**Hymo**	Hymo M, XL	$17.6m	176
SMART BIRDS	**Smart Birds**	Sinytsia 3.5, Pelican 8, Sova KBB	$10.8m	42
	Contra Drones	Contra Drones 8 Ultra, Boombox, Anti-FPV backpack	$6.5m	32
	Piranha Tech	Piranha Detector, DF-M, 5T, HAD-5	$4.1m	52
PARASOL	**Parasol**	Parasol 01, 02, 03	$3.2m	30

22. Source: Opendatabot.
23. Note: Some companies may produce additional military or civilian products beyond EW, so the revenue figures may not reflect EW-related revenue exclusively.

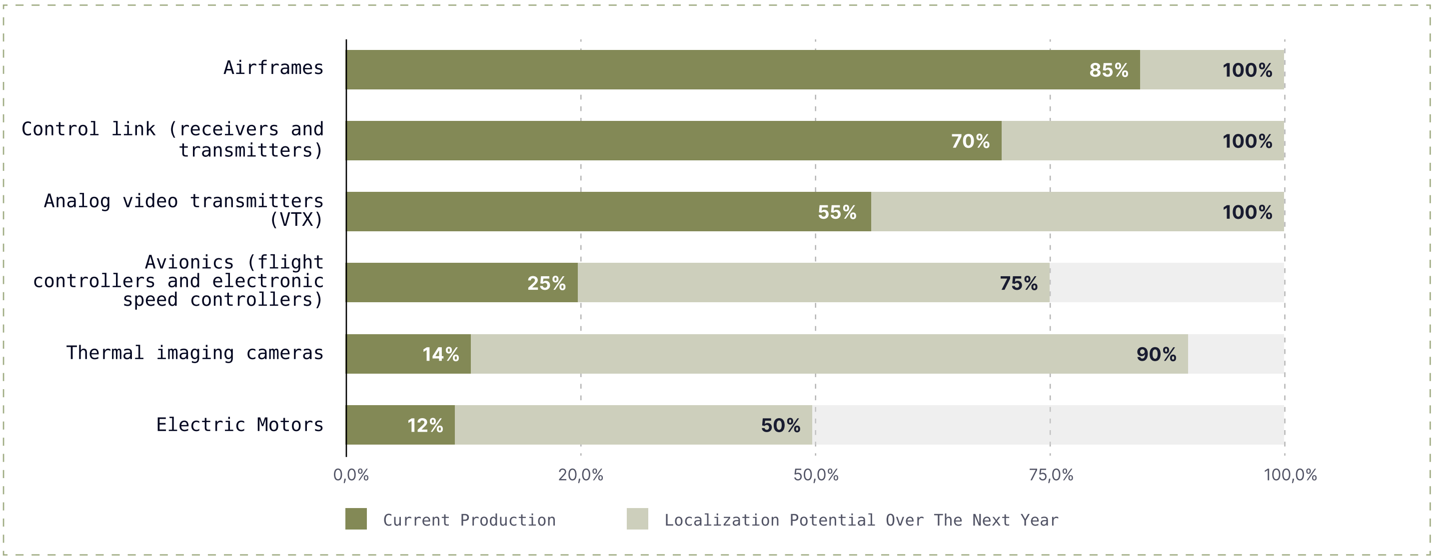
Components

MANUFACTURERS[24]

Airframes	SolarAir, GEDZ, HUGA SYSTEMS, DRONE FRAMES, POLYDRONE, FIBER FORM
Flight Controllers and Electronic Speed Controllers	VYRIY, XRUSH4, 603 700, KARMA, StingBee, TYKHO ELECTRONICS, Flytex
Thermal Cameras	SEEK UAV, OKO CAMERA, Odd Systems
Batteries	PAWELL, ПРОМАВТОМАТИКА, TULIP, BTRY ENERGY, ACCUM-SYSTEMS, СИЛА ХАРКОВА повербанки для військових потреб, EVCELL, ETHER TECHNOLOGY, STINEX TECHNOLOGIES, SCAT POWER BATTERIES, ACUDRONE
Communications (antennas, VTX/VRX, TX, RX)	TAF INDUSTRIES, 2E TACTICAL, RADION, Flytex, JECI, sine.engineering, SKYRAZOR, Scream Industries, COALAS, Bavovna Defense
Motors	motor-G, DRONE SPACE LABS, ARMADA, ENEY

24. The table does not include every component manufacturer in each category, but is intended to provide an overall view of the key players and the level of market saturation.

SHARE OF UKRAINIAN COMPONENTS IN UKRAINIAN UNMANNED SYSTEMS



70+

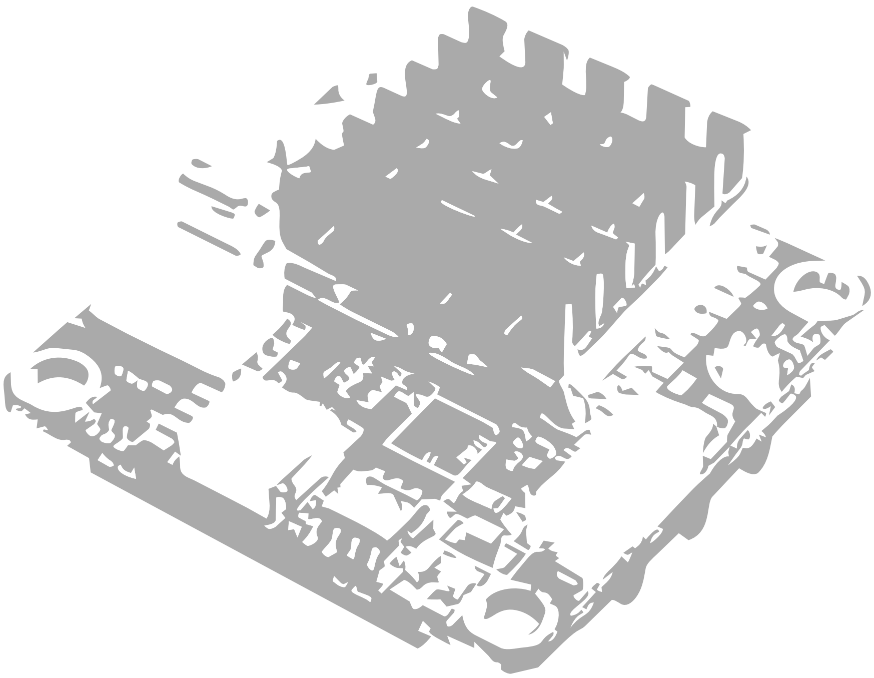
Ukrainian component manufacturers in the market

1,000

component products are listed on the Brave1 Market[25]

80%

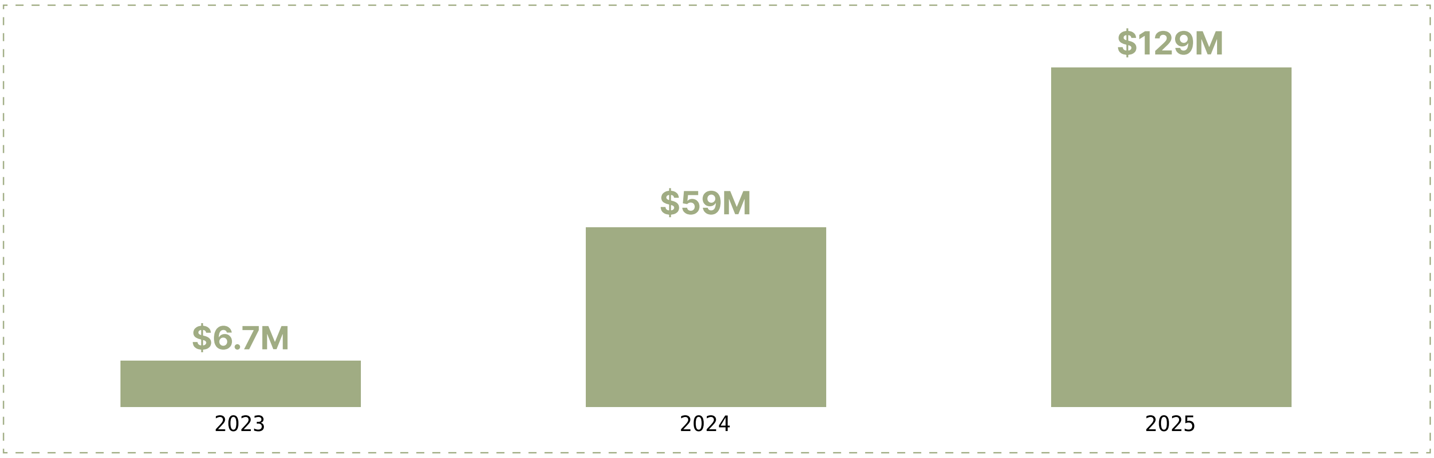
of UAV manufacturers use Ukrainian-made components in their products[26]



25. Source: Snake Island Institute and IRON.
26. Source: Snake Island Institute.

Investments

INVESTMENTS IN UKRAINIAN DEFENSE TECH SECTOR[27]



CAPITAL TYPE	DESCRIPTION	KEY PLAYERS
Angel Investors	The most widespread source of defense tech funding at the early stage of ecosystem development (particularly in 2023). Angel investors provided rapid seed capital, mentorship, and early prototyping support. Over time, this model gradually shifted toward more structured and institutionalized venture funding.	Individual Ukrainian and international defense-focused angel networks
Venture Capital	Institutional investment funds supporting scalable defense and dual-use technologies. Over time, several venture funds have emerged specifically to focus on defense-oriented portfolios	D3, Green Flag Ventures, MITS Capital
Strategic Investment (M&A)	Investments by large defense corporations aimed at technology transfer.	EDGE Group (UAE), Rheinmetall (DE)
State Grants	Ukrainian government funding mechanisms designed to accelerate R&D, prototyping, testing, and scaling of domestic defense technologies.	Brave1, Ukrainian Startup Fund (USF)
International Aid & Government-Backed Financing	Foreign government and multilateral funding initiatives supporting co-production, technology development, and defense industrial expansion in Ukraine.	"Danish Model," EU "SAFE" Program.

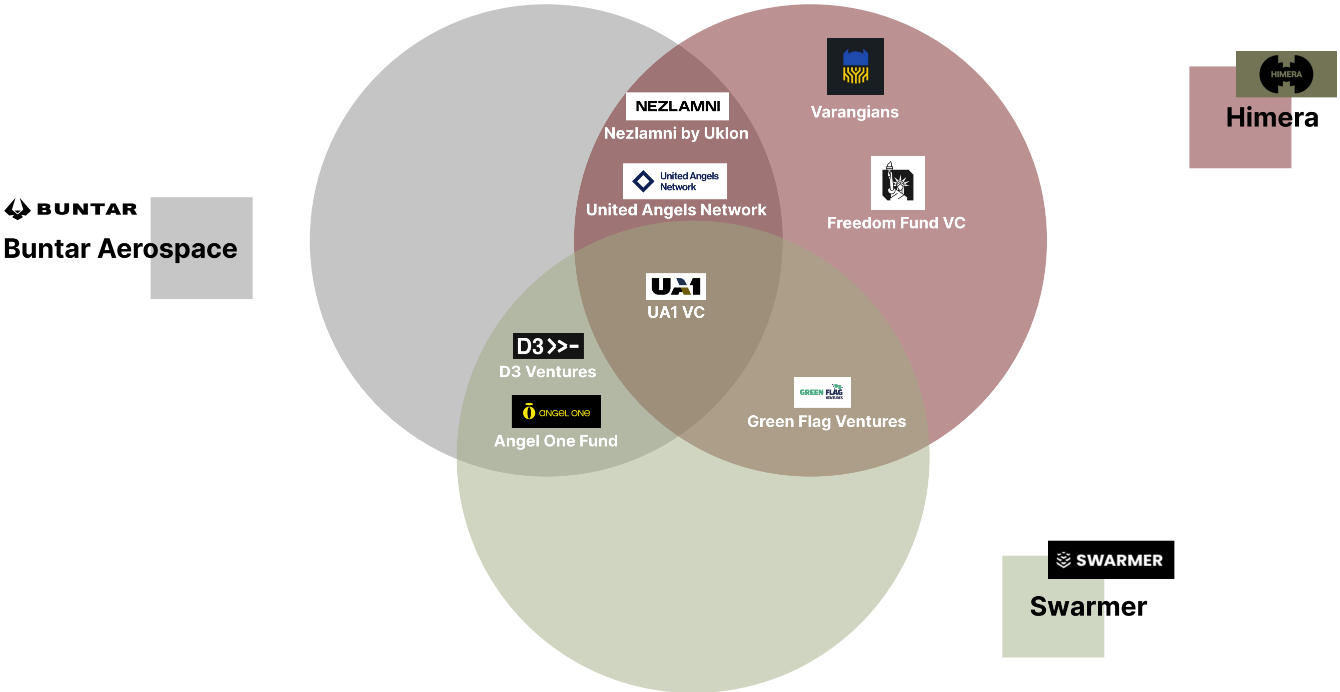
27. Source: Snake Island Institute and UCDI.

PRIVATE INVESTORS[28]

FUND		ESTIMATED CAPITAL	TYPICAL CHECK	UKRAINIAN PORTFOLIO COMPANIES
	MITS Capital	$50m	$500k - $3m	Teletactica, Norda Dynamics, M-FLY, Tencore, Aeromotors, Oko Camera, Angler, SPEYE, Vidar Systems, Vermeer
	D3 Ventures	$35m	$500k - $1.5m	Stealth, Airlogix, FlightMind.AI, Frontline Robotics, Buntar Aerospace, Swarmer, Drone Space, Ailand Systems, Zvook
	Green Flag Ventures	$20m	$100k - $1.2m	Kara Dag Technologies, Himera, Swarmer, Falcons
	UA1 VC	$18m	$300k - $750k	Airlogix, Buntar Aerospace, Frontline Robotics, Himera, Swarmer, Stealth
	Darkstar Coalition	$18m	$600k - $1.2m	Farsight Vision, Deftak
	Varangians	$10m	$100k - $1m	Norda Dynamics, Sine Engineering, Himera
	Angel One Fund	$3m	$50k - $300k	Swarmer, Mantis Analytics, Norda Dynamics, Buntar Aerospace
	Nezlamni by Uklon	$2m	$200 - $500k	Buntar Aerospace, Ailand Systems, Mantis Analytics, Himera, Frontline Robotics
	United Angels Network		$100k - $1m	Himera, Buntar Aerospace
	Freedom Fund VC		~$100k	Himera, Farsight Vision

28. Sources: EY, MITS Capital, D3 Venttures, Green Flag Ventures, UA1 VC, Darkstar Coalition, Varangians, Angel One Fund, Nezlamni, United Angels Network, InVenture, Crunchbase, Mind, Tectonic, DOU.

COMPANIES WITH 3+ FUNDS INVESTING



BIGGEST FUNDING DEALS[29]

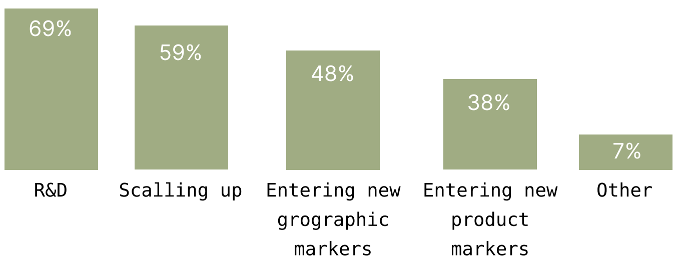
COMPANY	TOTAL INVESTMENT	INVESTORS	PRODUCT DESCRIPTION
Swarmer	$18.7m	Broadband Capital Investments, R-G.AI, D3, Green Flag Ventures, Radius Capital, Angel One, Network VC, UA1	AI-driven software for collaborative swarming and the autonomous coordination of heterogeneous UAV fleets.
Farsight Vision	$7.2m	Axon Enterprise, SmartCap Defence Fund	Geospatial intelligence platform converting media into 3D models for real-time battlefield decision support.
Trypillian	$5m	Brooks Newmark	Autonomous long-range strike drones, tactical UAVs for ISR and infantry support, and an AI-powered intelligence platform.
Buntar Aerospace	$4m	D3, UA1, Angel One, Nezlamni, United Angels Network	EW-resilient ISR and battlefield-mapping UAVs equipped with proprietary UAV control software.
Tencore	$3.7m	MITS Capital	Multipurpose UGVs for logistics, casualty evacuation, and mine clearance.

29. Sources: AVentures Capital, AVentures Capital, EY, Defender Media, InVenture.

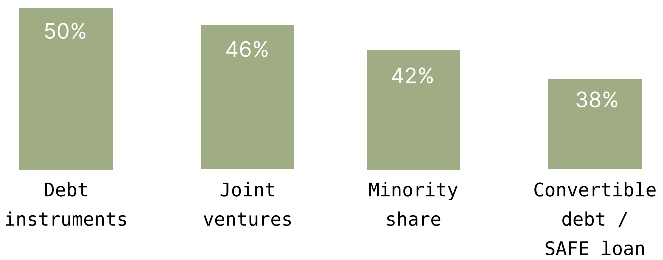
BIGGEST FUNDING DEALS[29]

COMPANY		TOTAL INVESTMENT	INVESTORS	PRODUCT DESCRIPTION
osavul	**Osavul**	$3m	42CAP, u.ventures, SMRK	AI-powered analytics platform leveraging OSINT for situational awareness across cyber, hybrid, informational, and physical domains.
DROPLA	**Dropla**	$2.7m	EIFO, Maj Invest, Final Frontier	AI-powered mine detection and clearance systems utilizing UAVs, UGVs, and support vehicles.
BAVOVNA	**Bavovna.AI**	$2.7m	Presto Tech Horizons, Network VC, Allied VC	AI-powered inertial UAV navigation kits and sensors for GNSS-denied and EW-threatened environments.
HIMERA	**Himera**	$2.5m	Green Flag Ventures, Nezlamni, United Angels Network, Freedom Fund, VYTACH, Big Defense, UA1, Varangians, Bulava Capital	Jam-resistant tactical radio systems and secure MESH communication networks.
Frontline	**Frontline**	$1.7m	Quantum Systems, Nezlamni, D3, UA1	Multifunctional logistics UAVs, EW-resilient ISR UAVs, and autonomous remote weapon stations.
SKY SPY	**Sky Spy**	$1.6m	Expeditions Fund, Superangel, Freedom Fund, Sunfish Partners, Crosscourt Ventures, Material Ventures	Signals Intelligence (SIGINT) platforms for detecting and mapping enemy emitters across the electromagnetic spectrum.
	Teletactica	$1.5m	MITS Capital, Green Flag Ventures	Jamming-resistant video and telemetry modems with compact antenna systems for UAVs, UGVs, and mobile platforms.
M-FLY	**M-FLY**	$1.3m	Resist.ua, MITS Capital, Freedom Fund	High-precision stabilization gimbals for high-fidelity video feeds on ISR UAVs.
NORDA DYNAMICS	**Norda Dynamics**	$1m	Varangians, MITS Capital, Angel One, United Angels Network, Unpopular VC	Autonomy modules for UAVs operating in GNSS-denied and EW-threatened environments.

REASONS COMPANIES LOOK FOR INVESTMENTS (TECH FORCE IN UA SAMPLE)[30]



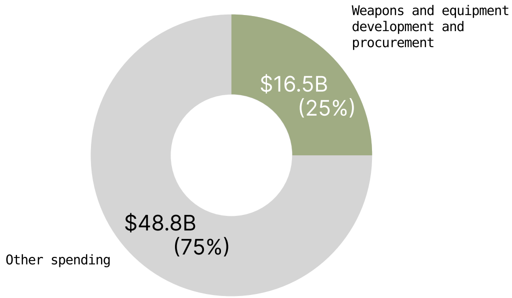
TYPES OF INVESTMENTS COMPANIES LOOK FOR (TECH FORCE IN UA SAMPLE)



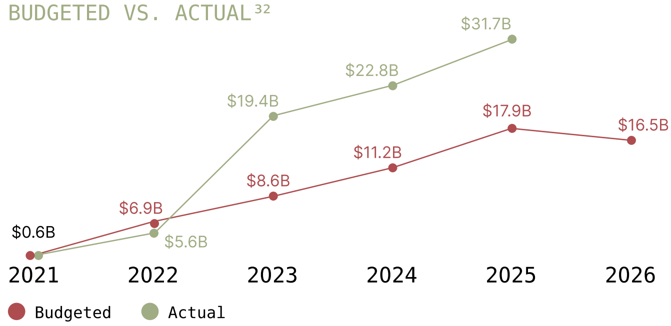
30. Source: Tech Force in UA.

Public Funding and Procurement

2026 MILITARY BUDGET[31]



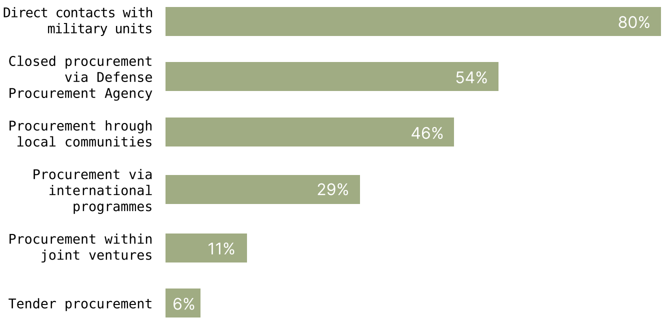
BUDGET SPENDING ON WEAPONS AND EQUIPMENT DEVELOPMENT AND PROCUREMENT ($B, CURRENT USD): BUDGETED VS. ACTUAL[32]



- **$25.6M+** in grants awarded in 2025[33]
- **$60M+** in grants awarded since the start of the program
- More than **600** grants awarded
- Typical grant size: **$5K–$180K**

BRAVE1
BRAVE1 Grant Program

MOST COMMON TYPES OF PROCUREMENTS REPORTED BY MANUFACTURERS[34,35]



NEW PROCUREMENT SYSTEMS IN UKRAINE[36]

DOT-CHAIN DEFENCE
A digital platform that allows military units to independently select weapons purchased using funds from the Defense Procurement Agency, while streamlining orders, contracts, and logistics.

E-POINTS
A digital rewards system where military units earn points for successful combat actions, which can be redeemed to order drones and other equipment. On the Brave1 Market, around 400 out of 3,300 items are available for purchase with E-points.

INTERNATIONAL PROGRAMS AND COOPERATION[37]

ZBROYARI: Manufacturing Freedom	Global fundraising campaign supporting Ukrainian weapons production, enabling donors to fund defense-industrial output.	9 allied countries and the EU pledged **US$1.5B** so far.
Brave-Norway	Supports Ukrainian and Norwegian startups in defense technologies through grants, hackathons, and collaboration.	**€20M** total, split equally; Norwegian funds support tech grants and testing in Ukraine.
EU4UA Defence	EU–Ukraine grant program supporting Ukrainian defense tech startups; the first stage focuses on high-speed interceptors and radar systems.	**€3.3M** total, with individual grants up to €150K.
Ukraine Phoenix Tech Fund	early-stage VC fund investing	**€50M** total; anchor

31. Source: Ministry of Finance of Ukraine.
32. Source: Open Budget.
33. Source: DOU (citing CEO Brave1).
34. Source: Tech Force in UA.
35. Sample — companies from the Tech Force UA cluster, survey conducted in October 2025
36. Sources: Militarnyi, United24, DOU (citing CEO Brave1).
37. Sources: Ministry of Digital Transformation, Militarnyi, Delegation of the European Union to Ukraine, Ministry of Defence, EU4Digital, European Council, Ministry of Defence, Ministry of Digital Transformation, The Kyiv Independent.

INTERNATIONAL PROGRAMS AND COOPERATION[37]

(UPTF)	In Ukrainian tech startups, providing capital, strategic support, and global network access.	commitments include €15M from EIB and €10M from the French public investment bank Bpifrance
Drone Coalition	Multinational initiative equipping Ukraine with drones and strengthening defense tech industries, led by Latvia and the UK with 20 member countries.	Over **€176M** in the Joint Fund; total partner support exceeds **€2B**
European Defence Industry Programme (EDIP)	Supports Ukraine's defence industry by financing capacity ramp-up and cooperative procurement with EU partners.	**€300M** dedicated to Ukraine (2025–2027).
Security Action for Europe (SAFE)	EU financial instrument enabling joint procurement with Ukraine to support its defence industry	Up to **€150B** in loans for EU defence investments; Ukraine participates in joint procurement with 15 Member States.
"Danish Model"	Allies purchase weapons from Ukrainian manufacturers directly for use by AFU.	In 2025 alone, the Ministry of Defence of Ukraine attracted more than **USD 2 billion** for Ukrainian production through the Danish model.
BraveTech EU	Collaboration between Brave1 and the EU to jointly develop and scale defence technologies, managed by the European Defence Innovation Office, which is based in Kyiv. Funding will come from the European Defence Fund and the EU Defence Innovation Scheme.	Unveiled in July 2025, **each party will invest €50 million** to accelerate R&D, testing, and deployment of dual-use and battlefield technologies. In 2026, the initiative aims to scale up promising technologies.
Weapons Export Centers	With its centers, Ukraine can export military equipment it holds in surplus and spend the profits on urgently needed weapons, allowing Ukrainian defence companies to sell their products outside of Ukraine for the first time.	In February 2026, President Zelenskyy announced plans to open **10 weapons export centers across Europe** (primarily in the Baltics and Northern Europe) by the end of the year.

CO-PRODUCTION AND JOINT VENTURES[38]

Project "Octopus"	Interceptor drones co-designed and co-produced in the UK and Ukraine.	First interceptors successfully tested Jan 2026, with a production goal of **2,000 interceptors per month.**
Quantum Frontline Industries	German-Ukrainian joint venture between Quantum Systems and Frontline Industries for the production of "Linza" drones for Ukraine, with a factory based in Germany.	The first produced drone was handed over to Pres. Zelenskyy in Feb 2026, with a production goal of **10,000 drones in a year.**
Auterion Airlogix Joint Venture GmbH	German-Ukrainian joint venture between Auterion and Airlogix for the production of AI-guided unmanned aerial systems for Ukraine and allied nations.	Unveiled in Feb 2026, with the Ukrainian government reportedly committed to delivery of **thousands of systems.**
Brave1 Dataroom x Palantir	US-Ukrainian cooperation for the creation of a secure environment for training AI models for military applications, based on real-world data from Ukraine.	Unveiled in Jan 2026, the Brave1 Dataroom will initially focus on developing autonomous technologies to detect and intercept enemy drones.

38. Sources: United24, United24, Quantum Systems, Auterion, Ministry of Defence, Militarnyi, European Security & Defence, France24, EURACTIV.

CO-PRODUCTION AND JOINT VENTURES[38]

“Project Eagle” or “Merops”	Collaboration between “Swift Beat” and the Ukrainian MOD to develop AI-powered interceptor drones, which were later used to also train NATO troops in Poland.	As of November 2025, Ukraine has been operating the Merops counter-drone system, an advanced anti-drone complex designed around interceptor UAVs, and has reportedly used it to **shoot down more than 1,000 Iranian-made Shahed drones.**
Skyeton Prevail	UK-Ukrainian joint venture Prevail Solutions and Skyeton for the production of Raybird ISR drones in the U.K.	In progress, Raybird has been successfully used during a British Army Exercise in Dec 2025.
Firepoint x Denmark (“FPRT ApS”)	Firepoint is launching production facilities for solid rocket fuel in Denmark.	In Dec 2025, Danish and Ukrainian officials marked the start of construction of the facility that will supply rocket fuel to Ukraine.
Greece x Ukraine	Greek and Ukrainian companies plan on co-producing Unmanned Surface Vehicles in Greek shipyards, both for the AFU and the Greek Army.	Announced in Nov 2025, the project is expected to be funded through Greece’s €30 billion defence budget for the period 2025–2036, with loans from Europe’s SAFE programme also under consideration.

Summary Table

Most developed sector	UAVs	Extensive operational use on the battlefield has accelerated production and deployment of aerial platforms, making UAVs the backbone of modern Ukrainian defense tech.
Highest Investment Sector	AI, Software, and Communications	High strategic importance for autonomous systems, situational awareness, and networked operations has attracted the majority of venture capital.
Fastest-growing sector	Components	Domestic supply chain localization and increased demand for drones and other systems have stimulated the rapid growth of component manufacturers.
Most promising sectors for near-term growth	UGVs, Components	Rising battlefield applications, rapid prototyping, and scaling of unmanned ground vehicles and supporting components indicate strong near-term potential.

SNAKE ISLAND INSTITUTE

The Snake Island Institute is an independent defense analytics and coordination center established to strengthen the strategic partnership between Ukraine and its western allies in the security sector through:

ANALYTICS:

Advancing understanding of modern warfare and doctrine

ADVOCACY:

Aligning Ukrainian and western decision-makers

DEFENSE TECH:

Enabling integration of critical technologies into combat operations

You can find more on our website.

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