

THE CENTRAL COAST

Built to Prove What's Next
in Autonomous Systems
and Advanced Air Mobility



REACH
Ideas + Action for a Thriving Central Coast



Monterey Bay
ECONOMIC PARTNERSHIP



**ECONOMIC
DEVELOPMENT
COLLABORATIVE**

The Central Coast Advantage

California's Central Coast has been at the forefront of aerospace, technology, and precision innovation for decades, and that legacy is accelerating.

This region harnesses the power of convergence: where innovation meets opportunity, collaboration meets scale, and momentum meets its moment. Where deep technological expertise meets the terrain that demands it—sea, land, air, and space. An ecosystem of collaboration where public, private and academic partnerships make opportunity a reality. The complete arc from education and world-class talent development to testing to manufacturing to launch exists here, in one region.

The advanced aircraft and autonomous systems industries are reshaping how the world moves, responds, and operates. The companies defining that future are being built right here.

04 EXECUTIVE SUMMARY

07 UNDERSTANDING ADVANCED AIRCRAFT

- 08 Overview
- 09 Types & Applications
- 10 Market Opportunity

12 ADVANCED AIRCRAFT ON THE CENTRAL COAST

- 13 Regional Market Strength
- 14 Market Leading Firms
- 15 Industry Ecosystem
- 16 Dynamic Innovation Ecosystem
- 17 Extensive Testing Assets and Infrastructure
- 18 Expansive Talent Pipelines and Access
- 19 Advanced Aircraft Firm Profiles
- 20 Organized Advanced Aircraft Industry Support and Investment
- 21 Asset Inventory

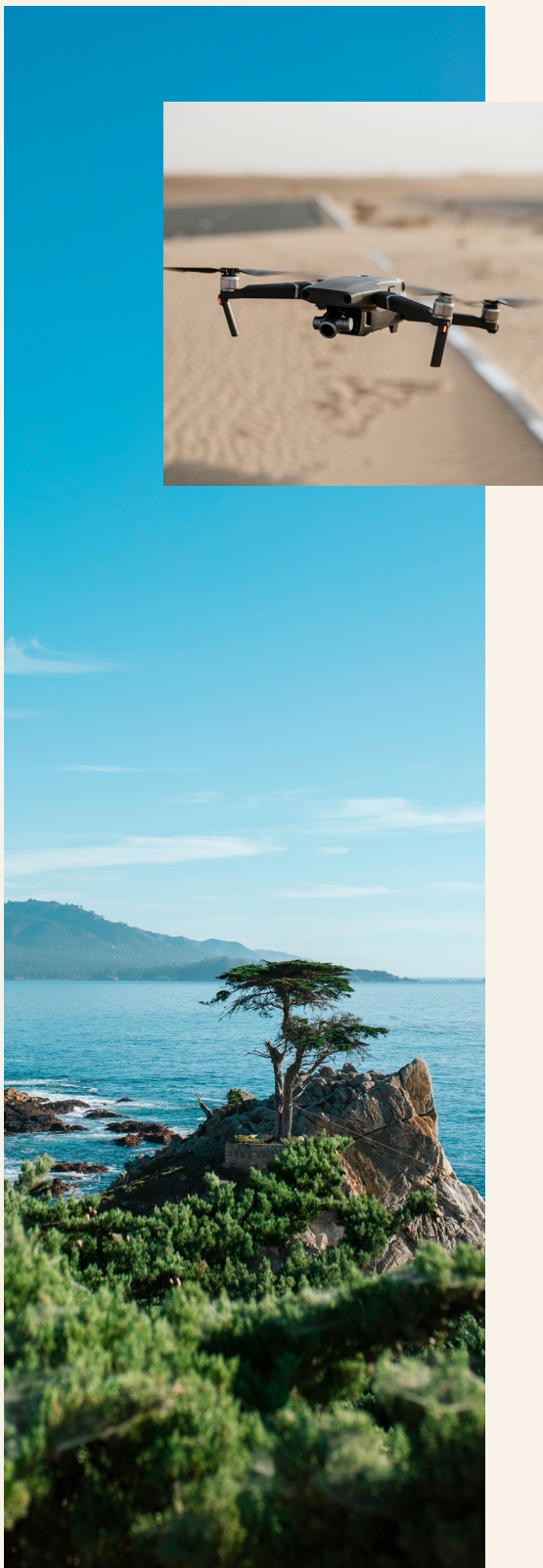
22 REACHING NEW HEIGHTS

24 SOURCES

01

EXECUTIVE SUMMARY

Executive Summary



California's Central Coast has emerged as one of the world's most dynamic and mature hubs for Autonomous Systems and Advanced Aircraft innovation and production. Spanning six counties from Santa Cruz in the north to Ventura in the south, the region brings together market-leading electric vertical take-off and landing (eVTOL) and drone or uncrewed aerial systems (UAS) firms, world-class dual-use research assets, extensive and versatile testing environments, and a deep engineering and precision manufacturing talent base. No other U.S. region can boast this combination of strengths to support development and commercialization of next-generation aircraft.

Advanced Aircraft technologies—including eVTOL vehicles, hydrogen-fueled aircraft, and drones or UAS—are poised to transform global transportation and logistics and improve public services across wide-ranging use cases, from defense and emergency response to wildfire abatement. With accelerated market adoption expected in the coming years, the Central Coast is uniquely positioned to shape the future of the emerging “low-altitude economy.”

Each subregion of the Central Coast contributes distinct and complementary strengths to a unified ecosystem. The San Luis Obispo and Santa Barbara region drives aerospace innovation, engineering talent, and advanced systems development; Ventura County provides critical defense infrastructure, testing assets, and advanced manufacturing capabilities; and the Monterey Bay region anchors multi-airport operations, real-world testing and integration, defense research, and advanced aviation R&D. The Uplift Central Coast Coalition, led by the Monterey Bay Economic Partnership, REACH, and the Economic Development Collaborative, unites this region with a shared vision to grow the Autonomous Systems and Advanced Aircraft Sectors.

UPLIFT COALITION IS A COLLABORATION OF:



Executive Summary



A CONCENTRATION OF EVTOL AND UAS LEADERS

The Central Coast is home to three of the four leading U.S. eVTOL companies—Archer Aviation, Joby Aviation, and Wisk Aero—alongside UAS innovators such as Reliable Robotics, Redwire, AeroVironment, Inspired Flight and Parallel Flight Technologies, and counter-UAS leaders such as Trust Automation. The region's concentration of top Advanced Aircraft firms and supply chain offers a strong value proposition for additional firms to locate and grow.

COMPLEMENTING AUTONOMOUS SYSTEMS LEADERSHIP AND UNCREWED UNDERWATER VEHICLES (UUV)

The concentration of UAS and advanced aircraft assets on the Central Coast is part of a broader ecosystem of Autonomous Systems technologies and products in other emergent high-growth market segments. For example, the components and software created in the region for autonomous aircraft are directly applicable to water vehicles. A strong demonstration of this is at Naval Base Ventura County's Point Mugu Sea Range used for UAS testing and evaluation as well as serving as a hub for the testing and development of UUVs. This combination of complementary supply chains, research and development, and commercialization resources amplifies the Central Coast's competitive advantage for the attraction and retention of firms and talent for autonomous systems mobility, whether in the air or water.

A DUAL-USE RESEARCH AND INNOVATION ENGINE

The region contains a robust network of federal defense assets powering Advanced Aircraft research, including the Naval Postgraduate School, Naval Base Ventura County, two NavalX Tech Bridge locations, and the Joint Interagency Field Experimentation (JIFX) program. These military assets along with top-tier engineering research at higher education institutions such as UC Santa Cruz, Cal Poly San Luis Obispo, and UC Santa Barbara anchor a dynamic culture of Advanced Aircraft innovation.

EXTENSIVE TESTING ASSETS AND INFRASTRUCTURE

With extensive, uncongested airspace and diverse terrain spanning coastal, mountainous, and agricultural regions, the Central Coast offers one of the most versatile Advanced Aircraft testing environments in the country. General aviation airports across the six counties along with military facilities such as the Point Mugu Sea Range, Camp Roberts, and Fort Hunter Liggett provide expansive zones for integrated testing. Public-sector investments are further expanding this capacity through new testing infrastructure, including the California Advanced Air Mobility Corridors Initiative (CAAMCI) FAA-aligned, multi-airport network of public-use general aviation airports designed to support eVTOL and UAS planning, testing, and integration led by MBEP.

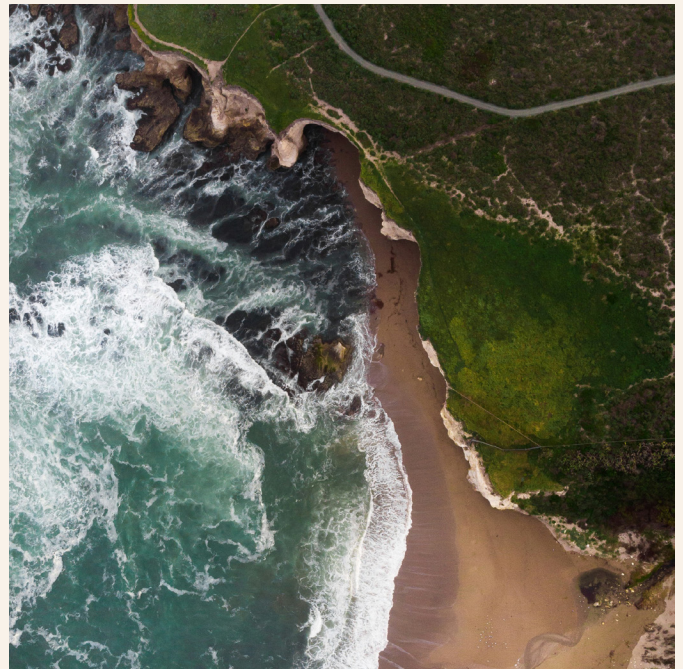
A DEEP AND SPECIALIZED TALENT PIPELINE

Seven decades of aerospace and precision manufacturing innovation and production on the Central Coast, combined with leading university engineering programs throughout California, has produced a density of talent specializing in advanced engineering, production, and aviation systems. Initiatives ranging from apprenticeships to community college training to high school STEM programs are ensuring a sustained talent pipeline to meet the needs of growing eVTOL and UAS firms in the region.

A REGION MOBILIZED FOR GROWTH

Business, government, civic leaders, military agencies, and K-16 education institutions on the Central Coast have been collaborating for years to support and grow the Advanced Aircraft industry. They have established a shared strategy and tactics for expanding eVTOL and UAS firm growth in the region focusing on talent initiatives, business attraction, increased access to testing facilities, and additional infrastructure build-out. State investments and targeted incentives further strengthen the region's competitive position.

With unparalleled assets, collaborative leadership, and accelerating industry momentum, California's Central Coast is uniquely positioned to lead the next era of Advanced Aircraft innovation, commercialization, and growth.





02

UNDERSTANDING ADVANCED AIRCRAFT

Overview

Types & Applications

Market Opportunity

Overview



Rapidly developing aviation technologies centered around vertical liftoff vehicles and drones are poised to dramatically reshape transportation, logistics, and public services across the globe in the coming years. This has given rise to a burgeoning Advanced Aircraft industry focused on the development, testing, and production of a wide array of next-generation aircraft, including electric vertical take-off and landing (eVTOL) vehicles, hydrogen-fueled aircraft, and drones or uncrewed aerial systems (UAS). Together, these technologies represent the most significant disruption to aviation and air transportation since the start of the jet age in the 1950s.

Advanced Aircraft innovations have a broad range of both civilian and defense (i.e. dual-use) applications spanning areas including national security, infrastructure inspection, wildfire abatement, public safety, emergency response, passenger air taxi, and cargo transport. These activities are tied together by their common application of sophisticated, highly-precise technologies to novel vehicle forms. Some of these vehicles are uncrewed and operate either autonomously or via remote, while others are piloted. This growing layer of activity in the airspace within 5,000 feet above the ground is being referred to as the “low-altitude economy.”

Drone usage has already been adopted across a range of industries, with major impact in areas ranging from defense to agriculture, to energy production to real estate, and construction to humanitarian relief. And while eVTOL technology is in earlier stages of testing and deployment for air taxi and shipment uses, its potential environmental benefits, promise of faster travel for short- or medium-range flights, and cost benefits are on the verge of transforming legacy air travel and transport systems. Despite drones and eVTOLs being at different stages of market adoption, innovation and growth for both vehicle types are supported and mutually reinforced by the same research, talent, and testing infrastructure assets.

Years of technological advancements in the areas of electric propulsion, autonomous flight control systems, and battery technology have led to a surge now in the development of new eVTOL and UAS vehicles. The arrival of increasingly sophisticated and viable prototypes has created a spike in testing, certification, and regulatory efforts with accelerated market adoption expected across a range of uses over the next 10-20 years.

WHY ADVANCED AIRCRAFT?

Given the emerging nature of the Advanced Aircraft industry, the terminology associated with it is also swiftly evolving. Advanced air mobility is frequently used as an umbrella term for the field with AAM used as a shorthand abbreviation. In the interest of engaging a broad range of business, government, and civic leaders around this emerging sector, we have chosen to refer to the industry as Advanced Aircraft, encompassing activity associated with advanced air mobility (AAM), eVTOLs, and uncrewed aerial systems (UAS) or drones.

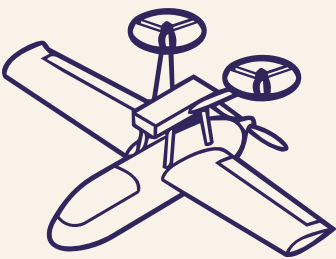
The industry is poised for tremendous growth as next-generation technologies for electric vertical take-off and landing (eVTOL) vehicles and uncrewed aerial systems (UAS) reach maturity.

Over the next decade, the global eVTOL market is projected to grow to \$80 billion and the UAS market to \$157 billion with widespread usage for passenger air travel, cargo transport, and public services including national security, emergency response, and wildfire abatement.

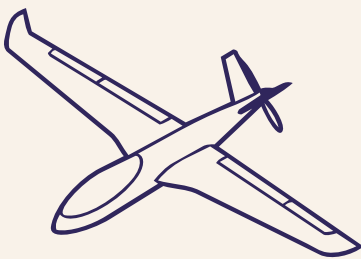
The race to validate eVTOL concepts and business models and expand UAS usage is fierce, with the companies and regions that capitalize on the Advanced Aircraft opportunity poised to reap an economic windfall.

Types & Applications

VEHICLE TYPES



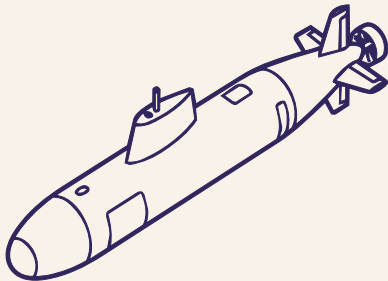
Electric Vertical Take-Off
+ Landing: **eVTOL**



Uncrewed Aerial Systems:
UAS/Drone



Crewed + Piloted:
Next-Gen Aircraft



AI-Operated, No Crew:
Autonomous Systems

APPLICATIONS

COMMERCIAL	Urban + Regional Routes: Passenger Air Taxi	PUBLIC	Early Detection + Tracking: Wildfire Monitoring	DEFENSE	
	Package + Freight: Cargo Delivery		SAR + Disaster Response: Search & Rescue		UAV-Based Monitoring: Surveillance + Recon
	Crop + Field Management: Agricultural Monitoring		Wildlife + Coastal Data Environmental Monitoring		Vandenberg SFB Missions: National Security
	Pipelines, Power Lines: Infrastructure Inspection		Rural + Remote Access: Medical Delivery		Forward Position Delivery: Logistics + Supply

Advanced Aircraft includes a range of emerging vehicle types, from eVTOLs and uncrewed aerial systems to next-generation piloted and increasingly autonomous platforms, each at different stages of development and commercialization. These vehicles share common advances in electric propulsion, flight controls, sensing, and the regulatory and infrastructure investment needed to reach scale.

They serve overlapping but distinct roles across commercial, defense, and public-sector applications. Near-term commercial use cases include passenger air taxi and cargo delivery, while public-safety and defense missions such as wildfire response, surveillance, and disaster support are already being deployed in many contexts. Across these applications, shared technology, testing, and operational know-how can accelerate progress across the broader field.

Market Opportunity



PHOTO COURTESY OF JOBY AVIATION



While national and global size and growth estimates for the Advanced Aircraft industry vary, there is consensus that strong expansion lies ahead. The global UAS market already reached \$37 billion in 2024 and is expected to expand to \$157 billion by 2034 at a compound annual growth rate (CAGR) of more than 15% over the next decade, with greater shares taken by civilian applications compared to current predominant usage for defense. While smaller, the eVTOL and advanced air mobility (AAM) market is expected to grow at an even faster pace, from \$12 billion in 2024 to \$80 billion in 2034 for a CAGR of 23%. Forecasts estimate the AAM market alone could account for 280,000 jobs in the U.S. by 2035.

With increasing clarity of the Advanced Aircraft industry's robust growth trajectory, it is drawing significant investment from a wide range of sources, with financial institutions like Citibank, BlackRock, National Development Bank of Brazil, and Japan's National Development Bank entering the space. Industry recognition and optimism has climbed to the point where a 2025 survey of investment managers found 93% expressing interest in eVTOL opportunities.

The flurry of innovation and investment in developing eVTOL concepts and expanding UAS usage across military and civilian applications has led to a surge in Advanced Aircraft company creation and growth. More than 500 companies are currently working on more than 2,000 eVTOL concepts worldwide, providing opportunities for firms in aircraft R&D, manufacturing, supply chain, infrastructure, fleet management, and software. The UAS industry has more than 5,000 firms globally working on drone development and manufacturing. With China currently producing more than double that of the U.S., national security concerns are spurring a policy and regulatory drive to onshore drone production for commercial uses that will further drive more domestic manufacturing.

UNCREWED AERIAL SYSTEMS (UAS)

\$37B	\$157B	15%
Global Market Size, 2024	Projected Market Size, 2034	Projected CAGR, 2024-2034

ELECTRIC VERTICAL TAKE-OFF & LANDING (EVTOL)

\$12B	\$80B	23%
Global Market Size, 2024	Projected Market Size, 2034	Projected CAGR, 2024-2034

INDUSTRY SCALE

5,000	500	280K
UAS Firms Worldwide	eVTOL Firms Worldwide	Projected U.S. Advanced Air Mobility Jobs by 2035

Market Opportunity

Another sign of the Advanced Aircraft industry's strength is the growing number of established firms in adjacent industries aggressively entering the space. This includes aviation and aerospace firms (Boeing, Airbus, Mitsubishi, Lockheed, Honeywell, GE Aerospace); airlines (United, Delta, American, Republic Airways); and automotive firms (Toyota, Mercedes-Benz, Honda, Hyundai) placing major investments and leveraging their resources and expertise to explore Advanced Aircraft opportunities. In the cases of airlines and automotive firms, many are paving the way for future integration of eVTOL and UAS technology with traditional air and ground travel.



The race to validate emerging eVTOL concepts and business models and expand UAS usage is fierce, with front-running firms moving rapidly to prototype, test, and certify aircraft and partnering to advance key design elements, boost production capacity, and build and leverage vertiport infrastructure. Market-leaders like Archer Aviation (with Northern Central Coast facilities in Salinas) are setting ambitious targets to launch demonstration projects, such as serving as the exclusive air taxi vendor of the 2028 Los Angeles Summer Olympics and partnering with Dubai-based aviation firm Jetex to develop an air taxi service network connecting 40 private air terminals across 30 countries. In the UAS space, Amazon has been aggressively expanding its drone pilot program efforts toward the goal of delivering 500 million packages annually by 2030.

The U.S. government is acting to enable industry growth by creating the rules and infrastructure needed to manage the air taxi traffic and “drone highway” that will be generated by the low-altitude economy. Executive orders in spring 2025 focused on supporting domestic drone manufacturing and accelerating testing and rulemaking to enable routine UAS operations, as well as launching eVTOL pilot programs to test applications like cargo transport and medical response. This has come alongside a \$1 billion federal investment in new UAS technologies over the past two years via the Department of Defense’s Replicator initiative to accelerate military drone applications.

Meanwhile, the Federal Aviation Administration has undertaken a flurry of moves to accelerate rulemaking governing testing and airspace for air taxis, eVTOL cargo delivery, and drones. These include (1) establishing “powered lift” as the first new category of civil aircraft since the introduction of helicopters in the 1940s, (2) piloting the usage of simultaneous beyond visual line of sight (BVLOS) drone operations for commercial and public safety uses, and (3) issuing guidances on vehicle airworthiness and vertiport designs. The June 2025 announcement of a five-country alliance among the U.S., United Kingdom, Australia, Canada, and New Zealand to streamline deployment of eVTOL aircraft across borders and achieve certification harmonization by January 2027 underscores the intensity of near-term industry growth.

Released in December 2025, the U.S. Department of Transportation’s Advanced Air Mobility (AAM) National Strategy further advances a clear path to integrate eVTOL aircraft and autonomous systems into U.S. airspace—promoting air taxis, cargo drones, job creation, and global aviation leadership. Key pillars include: airspace modernization, infrastructure development: safety and security, community engagement, and workforce development.

Using a phased “LIFT” approach—Leverage, Initiate, Forge, Transform—it moves from piloted operations using existing infrastructure in the near term to more autonomous, scaled systems over time. Priority applications include emergency response, regional mobility, and cargo logistics. A coordinated, whole-of-government effort—led by the FAA, NASA, and partner agencies—aims to position the U.S. at the forefront of next-generation aviation.

As the U.S. makes investments and commitments to bolster the sector, competition is ratcheting up among other nations and regional economies to establish Advanced Aircraft operations and market share. Among the countries making serious bids to grow their Advanced Aircraft sectors are Germany, China, South Korea, and Australia, while within the U.S., California, Ohio, Michigan, Oklahoma, Florida, Texas, and New York are all investing to leverage UAS and eVTOL commercialization and manufacturing assets for economic development.

03

ADVANCED AIRCRAFT ON THE CENTRAL COAST

- Regional Market Strength
- Market Leading Firms
- Industry Ecosystem
- Dynamic Innovation Ecosystem
- Extensive Testing Assets and Infrastructure
- Expansive Talent Pipelines and Access
- Advanced Aircraft Firm Profiles
- Organized Advanced Aircraft Industry Support and Investment
- Asset Inventory

Regional Market Strength



MONTEREY BAY AAM INNOVATION AND MARKET VALUE

The Monterey Bay region anchors a national concentration of advanced air mobility companies supported by major public market valuations, strategic corporate investment, and defense mobility partnerships.

\$6-9B Joby Aviation: Santa Cruz-based eVTOL manufacturer with major manufacturing, testing, and training operations in Monterey County. Backed by investments from Toyota, Delta, Uber, and others, Joby expanded its U.S. Air Force Agility Prime contract to support aircraft delivery, operations, and defense mobility testing.

\$5-7B Archer Aviation: eVTOL developer conducting flight testing in Monterey County, supported by Stellantis, United Airlines, and BlackRock. Through AFWERX Agility Prime contracts and its Archer Defense partnership with Anduril, the company is advancing hybrid-propulsion VTOL aircraft for Department of Defense applications.

\$640M-1B Reliable Robotics: Autonomous aviation company advancing FAA-certified remote aircraft operations and UAS integration partnerships in San Benito County, supporting next-generation cargo and defense aviation systems.

\$1-3B Wisk Aero: Boeing-owned autonomous eVTOL company with roots in the Zee Aero and Cora programs launched in 2010. Acquired fully by Boeing in 2023, Wisk advances next-generation passenger and autonomous mobility platforms through Boeing's aerospace and certification infrastructure.



SAN LUIS OBISPO REGION AAM ECONOMY BY THE NUMBERS

The San Luis Obispo region has emerged as a nationally recognized hub for uncrewed aerial systems, defense technologies, and advanced aerospace manufacturing, with companies securing major acquisitions, defense contracts, and global market reach.

\$925M Edge Autonomy: Acquired by Redwire Corporation in 2025 in a transaction valued at \$925 million, recognizing the SLO-based UAS manufacturer's 600-person team and global reach across 80 countries.

\$490M Trust Automation: Awarded a \$490 million U.S. Air Force contract in 2025 for the rapid research, development, prototyping, and production of counter-UAS defense systems, with all work performed at its San Luis Obispo facility.

\$200M ESAero (Empirical Systems Aerospace): Acquired by AeroVironment in 2026 for approximately \$200 million, with buyers citing ESAero's unique ability to move from engineering design to manufacturing execution for electric and hybrid UAS platforms.

\$100M+ Zone 5 Technologies: Acquired by Kongsberg Defence & Aerospace in 2025, with annual revenues exceeding \$100 million. Zone 5's Paladin drone is listed on the Defense Innovation Unit's Blue UAS List and is actively fielded in multiple U.S. Department of Defense programs.



SOUTHERN CENTRAL COAST AEROSPACE AND AUTONOMY CLUSTER

Ventura County and the broader Southern Central Coast aerospace corridor support advanced autonomy, sensing, defense aviation, and UAS technologies critical to both military and commercial applications.

\$600M Auterion: Focused on open-source drone operating systems, autonomy software, and defense drone platforms supporting military and commercial UAS applications.

\$4-6B AeroVironment: One of Ventura County's largest UAS and aerospace employers, with major operations in Simi Valley supporting defense, autonomous aircraft, and advanced military drone systems.

\$20B Teledyne FLIR: Part of Teledyne Technologies, with a strong regional UAS sensor and imaging presence supporting military and commercial drone systems along the Central Coast and Southern California corridor.

Market Leading Firms



PHOTO COURTESY OF INSPIRED FLIGHT

The Central Coast is home to an unparalleled concentration of market-leading Advanced Aircraft firms and supply chains with deep capabilities in prototyping, testing, and manufacturing eVTOL vehicles, hydrogen- and hybrid-fueled passenger and cargo aircraft, and drones. Joby Aviation, ZeroAvia, Archer Aviation, Wisk Aero, and Parallel Flight all have market presence, including numerous headquarters, in the Northern Central Coast / Monterey Bay region. With Joby, Archer, Alef Aeronautics, and Wisk, the Central Coast boasts the top eVTOL firms in the U.S. Firms focused on UAS and drone technologies include Parallel Flight, Reliable Robotics, Inspired Flight, Zone 5, Redwire; and AeroVironment. This concentration of top Advanced Aircraft companies provides a strong value proposition for additional firms to locate and grow in the region.

A broad range of factors and foundational assets have helped build out this ecosystem of leading eVTOL and UAS firms. Structural developments from decades ago that helped set the stage include the establishment in the 1950s of the Vandenberg Air Force Base (now Space Force Base) in Santa Barbara County as the primary launch and missile-testing site on the West Coast, the location of Naval Base Ventura County and the Naval Postgraduate School in Monterey County, and the creation of an aerospace engineering program at Cal Poly San Luis Obispo in 1969. More recently, the Navy's decision to place its FATHOMWERX tech incubator at Naval Base Ventura County in 2019 has provided a major boost to UAS research and startup activity in the region.

The clustering of research, talent, and infrastructure assets that is powering the Central Coast's Advanced Aircraft growth is further bolstered by complementary industry strengths. The region's aerospace industry—anchored by one of the world's busiest spaceports at Vandenberg Space Force Base—provides precision manufacturing and supply chain expertise alongside experience navigating complex government regulatory and defense contractor processes. Complementing and mutually reinforcing the region's Advanced Aircraft growth is the expansion of uncrewed underwater vehicle (UUV) activity on the Central Coast that uses similar mechanical and software technologies as eVTOLs and drones in sea-based or amphibious contexts, with the Navy using Naval Base Ventura County as a testing hub for underwater vehicles including the long-range Manta Ray UUV for extended undersea operations. Another adjacent industry niche is counter-UAS firms such as Trust Automation and WhiteFox Defense in San Luis Obispo County that develop technologies to detect, track, and neutralize military drones. This broader autonomous systems activity reinforces the Central Coast's position as a hub for next-generation mobility across air, land, and sea.

These industries are part of the region's broader specialization in highly complex "autonomous systems": technologies that are used to create high-value, exact products that can function independently in a range of challenging environments. The Central Coast's robust autonomous systems value chain activity—which includes microelectronics, agricultural technology, and medical devices in addition to Advanced Aircraft and aerospace—sits at the nexus of strengths in precision manufacturing (meaning the production of goods manufactured at extremely high accuracy, consistency, and reliability) and advanced business services (encompassing the development of software to operate autonomous systems). More than 7,000 firms and 80,000 jobs in these aerospace and autonomous systems value chain industries are located on the Central Coast, establishing baseline talent, research, and innovation assets that support and reinforce advanced aircraft industry development.

The Central Coast's Advanced Aircraft and complementary industry growth is all situated immediately proximate to Silicon Valley's hotbed of innovation activity and investment capital to the north, Los Angeles's aerospace manufacturing and innovation assets to the south, and the surrounding California desert test ranges, providing further strategic advantage.

Industry Ecosystem



The Central Coast’s Advanced Aircraft industry is supported by a broad ecosystem of complementary industries. More than 7,000 firms and 80,000 jobs in these value chain industries are located on the Central Coast.



ADVANCED AIRCRAFT INDUSTRY

TECHNOLOGY

- Software Development
- Autonomous Software
- Agricultural Technology
- Microelectronics

HARDWARE

- Precision Manufacturing
- Medical Devices
- Electric Motors
- Radar Components

SERVICES & SECTORS

- Advanced Business Services
- R&D Services
- Blue Tech
- Satellites

ENERGY & DEFENSE

- National Security
- Battery Manufacturing
- Hydrogen Fuel Tech
- Microelectronics

Dynamic Innovation Ecosystem

The Central Coast is home to an expansive network of federal assets powering dual-use (i.e., both civilian and military application) research and commercialization of cutting-edge Advanced Aircraft technologies. Military and other federal centers powering Advanced Aircraft innovation include:

- The Naval Postgraduate School (NPS) in Monterey is the Navy's premier technical graduate school and center for interdisciplinary research, leading trailblazing research in autonomy, AI, propulsion, and human-machine integration.
- Naval Base Ventura County specializes in research and testing related to autonomous systems and energy.
- NavalX's Tech Bridges at the Naval Postgraduate School in Monterey and at Naval Base Ventura County—connected through FATHOMWERX and FLEETWERX's defense commercialization efforts—facilitate technology transfer between private companies and U.S. Department of Defense stakeholders.
- Joint Interagency Field Experimentation (JIFX) provides real-time, field-scale prototyping opportunities across Monterey, San Luis Obispo, and Ventura counties via a program of recurring field events—often at Camp Roberts—where industry, academia, and government partners test early-stage technologies in real-world conditions.
- The Center for Naval Aviation Technical Training Unit Lemoore Detachment (DET) Point Mugu, located at Naval Base Ventura County, supports the Navy's future fleet of Northrop Grumman MQ-4C Triton long-range drones.
- NASA is advancing flight testing in Hollister to support autonomous aviation, remotely piloted cargo operations, and Advanced Air Mobility (AAM) in partnership with industry leaders.

Together, these assets make the Central Coast a one-of-a-kind ecosystem for dual-use R&D with a rich culture of active public-private collaboration. For instance, NASA has engaged with Reliable Robotics to remotely pilot cargo flights—successfully demonstrating a Cessna 208 Caravan flown from Mountain View—and with Wisk Aero on autonomous eVTOL testing, including vertical take-off, hover, and stability performance. Through its Air Traffic Management eXploration (ATMx) project, NASA is also working with Wisk Aero and Collins Aerospace to test ground-based surveillance systems that enable safe low-altitude, autonomous flight. In parallel, NASA is conducting safety and crashworthiness testing to inform future AAM standards, helping accelerate the integration of these technologies into the national airspace.



The ecosystem also helps pave the way for partnerships between local commercial and defense firms themselves, such as recent announcements of Archer partnering with Anduril Industries and Joby with L3Harris Technologies, both to produce hybrid vertical take-off and landing vehicles for military applications.

Alongside the Central Coast's considerable military innovation and commercialization assets are landmark research institutions heavily engaged in Advanced Aircraft development and/or related technologies. These include UC Santa Barbara; UC Santa Cruz; and Cal Poly San Luis Obispo; each of which features world-class engineering programs that are engaged in developing next-generation technologies supporting eVTOLs and drones.

The region's Advanced Aircraft innovation capacity led the Honda Research Institute to establish its fourth U.S. research hub in San Luis Obispo County in 2024, dedicated to advanced air mobility technology in aerospace and control system engineering, design, fabrication, and assembly.

Extensive Testing Assets & Infrastructure

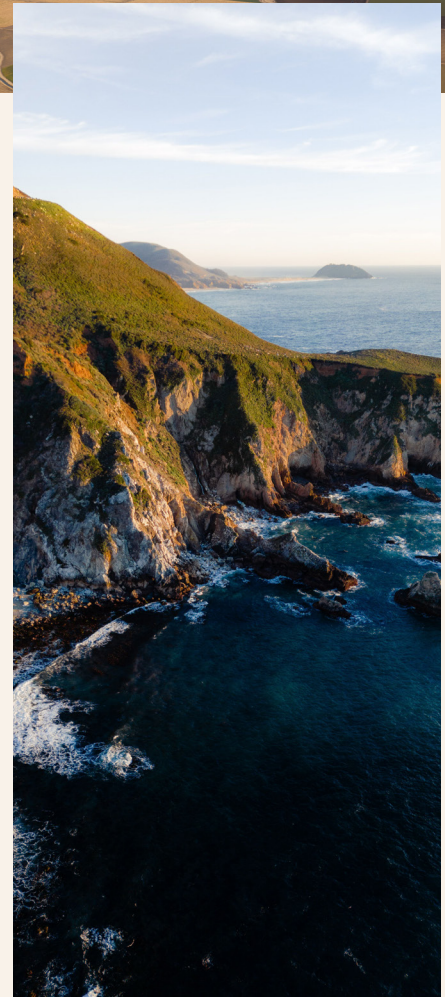
The Central Coast offers one of the most versatile and extensive Advanced Aircraft testing environments in the country. The region's uncongested airspace, combined with a mix of coastal, mountainous, and agricultural terrain and microclimates provide optimal conditions for evaluating range, noise, and flight stability for eVTOL and UAS prototypes.

A range of federal defense facilities provide an integrated testing capability across the region. Camp Roberts and Fort Hunter Liggett in Monterey and San Luis Obispo counties offer expansive, government-managed zones for integrated testing. Extending off the Central Coast from Naval Base Ventura County (NBVC) north to Monterey County, Point Mugu Sea Range represents the largest air-sea test range in the U.S. with 36,000 square miles of sea and airspace. The ANTX-Coastal Trident program at the Port of Hueneme brings together government agencies, industry, and academia to evaluate UAS and UAV technologies for port and maritime security with support from the nearby FATHOMWERX Lab innovation hub at NBVC. The JIFX network spanning Monterey, San Luis Obispo, and Ventura counties enables cross-jurisdictional experimentation in areas such as GPS-denied navigation and counter-drone technology. Vandenberg Space Force Base, home to the 2nd longest runway in the Air Force at 15,000 feet and extensive instrumentation, hosts significant test activities.

Public sector collaborations and investments are further building out Advanced Aircraft testing facilities and infrastructure. With a \$7.5 million state grant, the California Advanced Air Mobility Corridors Initiative led by the Monterey Bay Economic Partnership (MBEP) is developing the first FAA-compliant multi-airport eVTOL and UAS flight corridor network providing "vertiport" connections between Marina, Salinas, Watsonville, and Hollister airports. This effort reflects a shift from isolated testing environments to coordinated, multi-airport systems that can support real-world eVTOL and UAS operations. To the south, Ventura County has received FAA approval for a 500-square-mile UAS and eVTOL testing site along with high-capacity charging systems and an innovation center with incubation and rapid prototyping space at Camarillo and Oxnard airports.

This regional testing infrastructure provides access to exceptionally diverse environments. All topographies are covered by the facilities in the region. Extreme microclimates driven by cold Pacific Ocean currents, coastal fog, and rugged terrain can produce 20-30°F temperature swings within just a few miles. This allows rapid, real-world testing across cold, wet, low-visibility conditions and hot, dry environments.

Reinforcing the region's advantage is proximity to complementary testing environments in adjacent areas of California. These include Mojave Air & Space Port in Kern County and the surrounding California desert (including Edwards Air Force Base and Yuma Proving Ground) to the east. These areas are home to testing of advanced UAS, particularly focused on Short Takeoff and Landing (STOL) capabilities, drone-hunter roles, and autonomous combat operations.



Expansive Talent Pipelines & Access

Seven decades of aerospace and precision manufacturing industry innovation and production on the Central Coast, as well as employment and education throughout California, has established a density of talent specializing in advanced engineering, production, and aviation systems. The technical skills and expertise required for eVTOL and UAS development—including systems engineering, aerodynamics, automation, AI, and advanced battery chemistry—are abundant within the Central Coast workforce. Deep expertise in defense contracting, aviation regulation, and rapidly evolving technologies sets the Central Coast apart from regions that may have isolated strengths but lack its overall breadth and depth in advanced aviation talent.

At the same time, business, government, civic, and philanthropic leaders throughout the Central Coast are partnering to accelerate the region's industry-ready workforce and harness Advanced Aircraft growth to expand opportunity for all. This has been a particular focus of significant state investments in community college programs, business talent initiatives, and other supports. Representative efforts include:

- UC Santa Cruz's Drones Uplifting the Central Coast (DUCC) program is responding to strong demand for drone operators in areas including agriculture, infrastructure inspection, and public safety by broadly distributing its curriculum across community colleges and K-12 schools.
- Cuesta College in San Luis Obispo has an aviation technician program for drone maintenance and repair and is creating a new cutting-edge facility to support Advanced Aircraft and aerospace training. Allan Hancock College is launching a new aerospace technician program to support the Advanced Aircraft industry and Vandenberg. And Monterey Bay regional community colleges—Cabrillo, Monterey Peninsula, and Hartnell—all boast drone training programs for UAS applications.
- Joby Aviation and the Monterey Bay Drone, Aviation, and Robotics Technology (DART) initiative, with financial support from the Irvine Foundation, have partnered to pilot and expand apprenticeship programs for eVTOL vehicle manufacturing and maintenance.
- Rancho Cielo's Ag Technology & Mechatronics Program in Monterey County introduces electro-mechanical fundamentals, applications, and technologies in modern agricultural production to students ages 16-24, and the Pajaro Valley Unified School District (PVUSD) in Santa Cruz County launched a career and technical education (CTE) pathway focusing on advanced air mobility.

In addition to these targeted efforts to meet industry workforce needs, investments in aerospace and STEM education are further strengthening the Advanced Aircraft talent pipeline. Cal Poly's Paso Robles Spaceport Training and Research Center will establish a commercial space education hub on the Central Coast, and Allan Hancock College and Cuesta College are expanding career awareness and pathways in the aerospace sector. STEM programs connecting K-12 youth with exposure to Advanced Aircraft and adjacent tech and manufacturing industries are extensive and growing throughout the region, mapping out opportunities in engineering, maintenance, software development, assembly, data analysis, and piloting.



Higher education anchors including UC Santa Cruz; UC Santa Barbara; Cal Poly San Luis Obispo; California State University, Monterey Bay and Channel Islands; and area K-16 education systems including community colleges continue to fuel this talent advantage with degree and training programs aligned with the region's autonomous systems value chain strengths. The Central Coast's aerospace engineering talent pipeline is especially impressive with Cal Poly San Luis Obispo ranked as the #2 undergraduate program in the U.S. and top-ten aerospace programs immediately adjacent to the region at Stanford, Berkeley, Caltech, and UCLA.

Advanced Aircraft Firm Profiles



PHOTO COURTESY OF ESAERO

ESAERO

Formed by three recent Cal Poly graduates in 2003, Empirical Systems Aerospace (ESAero) provides cutting-edge engineering design services and manufacturing capability for eVTOL and UAS vehicles. Described as “an advanced design group to advanced design groups,” ESAero specializes in conceptual Advanced Aircraft designs for military and industry clients, rapid iteration and testing, and high-precision manufacturing with a focus on electric and hybrid propulsion systems. In addition to client work, ESAero has also established its own product lines of military, counter-UAS, and swarm drones as well as hydrogen fuel cells and testing machinery for use across a range of Advanced Aircraft vehicles.

With research, prototyping, and production facilities in San Luis Obispo and at Oceano Airport, ESAero has grown to 150 employees with annual revenues between \$10 million and \$50 million. Looking to ensure that the innovative firm maintains its talent advantage and connects area residents to Advanced Aviation opportunities, ESAero has partnered with the nonprofit SLO Partners to provide a six-week modern manufacturing boot camp that upskills workers for assembly and engineering positions in the industry.



PHOTO COURTESY OF JOBY AVIATION

JOBY AVIATION

Founded and headquartered in Santa Cruz, Joby Aviation has grown from its 2009 roots as a small team of engineers developing core eVTOL technologies to a global front-runner in the race to deliver commercial air taxi passenger service. Joby leveraged its early innovations in electric motor, flight software, and lithium-ion battery design into its first full-scale demonstration eVTOL flight in 2017, paving the way for its current vehicle design with six tilting propellers and room for one pilot and up to four passengers.

Now at 1,700 employees, Joby has focused on building its manufacturing capacity with a pilot production facility at the Marina Municipal Airport in Monterey County and strategic partnerships to accelerate its prototyping, testing, and certification efforts. They have partnered with Toyota for precision manufacturing expertise, Uber and Delta Airlines for service agreements, and governments in Saudi Arabia, Kazakhstan, and the United Arab Emirates to establish early pilot programs. With more than 40,000 miles of eVTOL aircraft test flights completed and approaching the final stages of FAA certification, Joby is well-positioned to achieve commercial viability and bring fast, quiet, and zero-emission air taxi service to cities.



AEROVIRONMENT

AeroVironment has evolved from its beginnings in 1971 as a niche engineering firm focused on human- and solar-powered flight to become a market leader in defense and drone technologies with annual revenues approaching \$2 billion. With a major design and manufacturing presence in Simi Valley and Moorpark in Ventura County, AeroVironment (AV) is a leading supplier of small- and medium-sized drones for military and government uses, specializing in intelligence, surveillance, and reconnaissance (ISR) and precision strike missions. Every U.S. military service along with 55 allied nations use AV UAS products.

AV initially moved into UAS design in the mid-1980s with the Pointer, a battery-powered drone equipped with cameras and real-time video-streaming capabilities decades before the technology's widespread adoption. AV's lightweight, hand-launched Raven drone is now the most widely deployed UAS system in the world. Other UAS products designed for versatility and ease of use in combat situations include its Wasp and Puma UASes, a hummingbird lookalike drone, and the Switchblade kamikaze explosive. AV also develops command and control software and integrated software for autonomous, AI, and counter-UAS uses.

Organized Advanced Aircraft Industry Support & Investment



Business, government, and civic leaders throughout the Central Coast have been organized and actively collaborating for years to accelerate Advanced Aircraft industry growth. The Uplift Central Coast initiative has brought together the region's three leading economic development organizations—Monterey Bay Economic Partnership (Santa Cruz, Monterey, and San Benito counties), REACH (San Luis Obispo and Santa Barbara counties), and the Economic Development Collaborative (Ventura and Santa Barbara counties)—to advance a shared vision for growth. Together, the Uplift partners developed an activation plan delivered to the California Governor's Office of Business and Economic Development presenting detailed strategies and tactics to leverage the Central Coast's distinctive niche in Advanced Aircraft innovation, testing, and demonstration activity. The plan highlights talent initiatives, increased access to testing facilities, business attraction, and additional infrastructure build-out as priorities. This builds upon recent collaborative funding proposals, feasibility studies, and convenings aimed at elevating the industry.

The Uplift partners' Advanced Aircraft efforts complement several existing collaboratives that have helped expand the region's eVTOL and UAS strengths. DART, UC Santa Cruz, and the Monterey Bay Economic Partnership formed the Monterey Bay Tech Hub to drive Advanced Aircraft growth and opportunity in the tri-county region of San Benito, Santa Cruz, and Monterey counties with a focus on workforce training and policy reform. Industry, higher education, and government partners have come together to create the Area 805 innovation hub in Ventura County with a new testing range and supports for Advanced Aircraft startups and research. Each of these collaborations draws upon the diverse array of higher education and military assets that power Advanced Aircraft innovation and commercialization in the region.

The state of California's Economic Blueprint and California Jobs First initiative have identified aerospace and defense as sectors for priority action, with more than \$16 million invested in 2025 to support Advanced Aircraft-related talent, innovation, and infrastructure investments on the Central Coast.

With such strong innovation, talent, and infrastructure fundamentals in place, California utilizes targeted incentives to support attraction and retention of Advanced Aircraft firms. Industry leaders that have received CalCompetes grants include Joby Aviation in Santa Cruz (\$9.8 million) and AIBOT in Long Beach (\$15 million). The state's emphasis on clean transportation priorities have yielded forward-thinking regulations and incentives for sustainable aviation, including tax benefits and other financing support for firms involved with eVTOL manufacturing and development.

Asset Inventory

● FIRM
 ● MILITARY
 ● RESEARCH
 ● SUPPORT
 ● TALENT
 ● TESTING

SANTA CRUZ: 17

- Aerography
- Fathom Light
- Insight Up Solutions
- Joby Aviation
- Parallel Flight Tech.
- Agility Prime
- CITRIS CIDER
- Airspace Integration
- DART
- MBEP
- NASA AAM Partnership
- Cabrillo College
- Monterey Bay Tech Hub
- UC Santa Cruz
- CAAMCI
- Monterey Bay Academy Airport
- Watsonville Airport

MONTEREY: 18

- Archer Aviation
- Kimley-Horn
- LahakX
- Agility Prime
- Camp Roberts
- Central Coast Tech Bridge
- Fort Hunter Liggett
- Joint Interagency Field Exp.
- Naval Postgraduate School
- DroneCamp
- MBEP
- CSU Monterey Bay
- Hartnell College
- K12 Regional Skills Lab
- Monterey Bay Tech Hub
- CAAMCI
- Marina Airport
- Salinas Airport

SAN LUIS OBISPO: 20

- Edge Autonomy
- ESAero
- Inspired Flight Tech.
- Mach Propulsion
- Mantis Composites
- Prec. Construction Svcs.
- Streamline Aerospace
- Trust Automation
- WhiteFox Defense
- Wisk Aero
- Zone 5 Technologies
- Camp Roberts
- Joint Interagency Field Exp.
- Honda Research Institute
- Paso Robles Space T&R Ctr.
- REACH
- Cal Poly SLO
- Cuesta College
- K12 Regional Skills Lab
- Point Mugu Sea Range

SAN BENITO: 8

- Alef Aeronautics
- Wisk Aero
- ZeroAvia
- MBEP
- Gavilan College
- Monterey Bay Tech Hub
- CAAMCI
- Hollister Airport

VENTURA: 19

- AeroVironment
- Auterion
- GBL Systems
- Jump Aero
- Mayman Aerospace
- Northrop Grumman
- Quantum Systems
- Swarm
- Woolpert
- Toray Advanced Composites
- CNATT Det. Point Mugu
- FATHOMWERX
- Naval Base Ventura County
- Ventura Tech Bridge
- Econ. Dev. Collaborative
- Matter Labs
- NASA AAM Partnership
- Ventura County AAM Innov. Ctr.
- Point Mugu Sea Range

SANTA BARBARA: 15

- Launchpoint Electric Prop.
- Lockheed Martin
- Santa Barbara Infrared
- Toyon Research Corp.
- Vandenberg SFB
- Econ. Dev. Collaborative
- REACH
- Allan Hancock College
- Gateway Educational Svcs.
- K12 Regional Skills Lab
- Ocean Collective
- Prec. Mfg. Career Pathways
- Santa Barbara City College
- UC Santa Barbara
- Point Mugu Sea Range

OUTSIDE 6 COUNTY REGION: 16

- Aero Systems West *(Santa Clara)*
- ASKA *(Santa Clara)*
- Auterion *(Santa Clara)*
- Matternet *(Santa Clara)*
- Reliable Robotics *(Santa Clara)*
- Wing *(Santa Clara)*
- Toray Adv. Composites *(Santa Clara)*
- Elroy Air *(San Mateo)*
- Skydio *(San Mateo)*
- Skyfront *(San Mateo)*
- Skyway *(San Mateo)*
- Zipline *(San Mateo)*
- Neros *(Los Angeles)*
- CA Jobs First Initiative
- Future Labs
- Irvine Foundation

The image features a large, stylized number '04' in a cream color. The '0' is a simple circle, and the '4' is composed of two strokes. A wavy line, colored teal, flows from the left side of the '0' and curves upwards and to the right, passing behind the '4'. The background is split: the top-left corner is cream, and the rest of the page is a solid teal color.

04

REACHING NEW HEIGHTS

Reaching New Heights

The Central Coast has marshalled and leveraged its unique assets to become home to one of the most mature and dynamic clusters for Advanced Aircraft in the world. While the progress to date has been impressive, private, public sector, nonprofit, and university partners are aggressively maintaining their focus on investments and supports to take the region's Advanced Aircraft advantage to new heights.

Some of the efforts underway to further expand the Advanced Aircraft industry on the Central Coast include:

- Building out the California Advanced Air Mobility Corridors Initiative (CAAMCI), the state's first FAA-compliant eVTOL and UAS flight corridor network across four regional airports in the Monterey Bay region
- Creating the FATHOMWERX Proving Ground at the Port of Hueneme in Ventura County focused on multi-domain (air, land, water, and space) uncrewed vehicle development and testing
- Developing the Area 805 AAM testing facility and innovation center in Ventura County
- Implementing new pilot and demonstration projects, including Archer Aviation providing eVTOL services for the 2028 Summer Olympics in Los Angeles
- Expanding apprenticeship programs for eVTOL vehicle manufacturing and maintenance
- Engaging K-16 institutions around STEM education and careers in Advanced Aircraft manufacturing and maintenance with expansion of related CTE programs
- Executing a coordinated activation plan to support the Central Coast's position as the premier location for Advanced Aircraft industry growth



Join a region harnessing the power of **convergence**: where innovation meets opportunity, collaboration meets scale, and momentum meets its moment.

There's no place like this.

05

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