

Global and Asia-Pacific Unmanned Aerial System (UAS) Market - A Global and Regional Analysis: Focus on Application, Drone Type, Mode of Operation, Infrastructure, Range, Component, and Country - Analysis and Forecast, 2023-2033

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Abstracts

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Introduction of Unmanned Aerial System (UAS)

The emergence of unmanned aerial systems (UAS), occasionally known as drones, represents a significant technological advancement, changing operations in a variety of commercial and government sectors. These systems, distinguished by their remote piloting capabilities and adaptable architecture, have spread beyond military applications to industries including agriculture, real estate, infrastructure, and emergency services. In agriculture, UAS is transforming precision farming by delivering comprehensive aerial images that allow farmers to check crop health, monitor irrigation, and optimize pesticide distribution. The real estate business uses UAS for aerial photography, which provides immersive property views and improves marketing methods. Drones play an important role in infrastructure inspections, damage assessments, and construction progress monitoring, providing a safer and more cost-effective alternative to traditional techniques.

Market Introduction

Unmanned aerial systems (UAS), sometimes known as drones, were first developed in the early twentieth century, in an era of tremendous technical developments in aviation

and radio control. The origins of UAS may be traced back to World War I when Austria launched a series of unmanned, radio-controlled balloons loaded with bombs on Venice in 1849. However, during World War II, the notion of UAS became more defined, owing mostly to the requirement for target practice, reconnaissance, and combat missions. Notably, Reginald Denny, an actor and inventor, developed the Radioplane OQ-2 in the 1930s, which represented a significant milestone. In the contemporary context, the unmanned aircraft systems operator is crucial, being responsible for piloting and overseeing the operations of unmanned aerial vehicles.

Nowadays, unmanned drones are characterized by fast technical progress and rising use across a wide range of industries, including commercial, environmental, and public service activities. Cutting-edge breakthroughs in AI, machine learning, and sensor technologies are greatly improving UAS's autonomy, dependability, and adaptability. Companies such as DJI and Parrot are constantly developing and producing drones with advanced features such as real-time data processing, obstacle avoidance, and extended flying endurance. The sector is also seeing an increase in strategic partnerships between tech giants and drone start-ups, with a focus on developing integrated solutions for precision agriculture, infrastructure inspection, disaster management, and delivery services, demonstrating the UAS industry's robust growth and pivotal role in shaping the future of autonomous technology and aerial operations.

Industrial Impact

The introduction of unmanned aerial systems (UAS) has signaled a transformational period in a variety of industrial sectors, characterized by higher efficiency, improved data collecting, and a fundamental shift in operating paradigms. UAS technology has transformed traditional agricultural methods, allowing precision agriculture by providing high-resolution airborne imagery for crop monitoring, health evaluation, and land management. This detailed level of data enables educated decision-making, optimizes resource allocation, and considerably increases agricultural yields while reducing environmental effects. Furthermore, in the field of infrastructure and construction, UAS have proven useful in conducting extensive inspections of difficult-to-access buildings such as bridges, skyscrapers, and wind turbines. This not only assures greater safety standards by allowing early detection of structural flaws, but it also results in significant cost savings by decreasing the need for manual inspections and minimizing the danger of workplace accidents.

Simultaneously, UAV system technology is at the forefront of altering emergency response and catastrophe management procedures. In situations when every second

counts, UAS provides quick, real-time observation and evaluation of disaster-stricken areas without exposing people to dangerous conditions. This feature facilitates the quick and efficient deployment of emergency services, which improves the efficacy of rescue operations. Furthermore, in environmental monitoring and conservation activities, unmanned aerial system (UAS) or unmanned aerial vehicle (UAV) provides an unprecedented platform for large-scale data collecting and habitat monitoring, enabling insights into patterns and changes that are invisible at ground level. This high-level overview provides a more thorough and proactive approach to environmental stewardship, which helps to preserve biodiversity and manage natural resources sustainably. As these systems mature and include powerful AI and machine learning algorithms, UAS's potential to promote innovation and operational excellence across sectors is likely to grow, ushering in a new era of industrial efficiency and environmental awareness.

Market Segmentation:

Segmentation 1: by Application

Commercial

Government

Commercial Segment to Dominate the Global and Asia-Pacific Unmanned Aerial System (UAS) Market (by Application)

The global and Asia-Pacific unmanned aerial system (UAS) market is led by the commercial application segment, which held a 98.11% share in 2022. The growing emphasis on technological advancement, shifting consumer preferences, and favorable economic conditions are expected to create demand and opportunities for expansion. For instance, in February 2023, Zipline International, Inc. received authorization from the FAA to use drones for commercial package deliveries in the vicinity of Salt Lake City. These drones are permitted to operate beyond the operator's visual line of sight without the need for visual observers.

Segmentation 2: by Drone Type

Fixed Wing

Rotary Wing

Rotary Wing Segment to Dominate the Global and Asia-Pacific Unmanned Aerial System (UAS) Market (by Drone Type)

The global and Asia-Pacific unmanned aerial system (UAS) market is led by the rotary wing drone type segment, which held a 78.88% share in 2022. The growing demand within the segment is propelled by technological advancements such as advanced imaging technologies, such as light detection and ranging (LiDAR) and high-resolution cameras, commercial adoption, and supportive regulatory environments.

Segmentation 3: by Mode of Operation

Remotely Piloted

Semi-Autonomous

Autonomous

Remotely Piloted Segment to Dominate the Global and Asia-Pacific Unmanned Aerial System (UAS) Market (by Mode of Operation)

The global and Asia-Pacific unmanned aerial system (UAS) market is led by the remotely piloted mode of operation segment, which held a 64.83% share in 2022. The segment's growth is driven by the increased adoption of remotely piloted UAVs for diverse applications, including surveillance, reconnaissance, border patrolling, and monitoring, and the surge in demand for advanced technologies in UAVs.

Segmentation 4: by Infrastructure

Unmanned Traffic Management (UTM)

Drone Receptacle

Drone Receptacle Segment to Dominate the Global and Asia-Pacific Unmanned Aerial System (UAS) Market (by Infrastructure)

The global and Asia-Pacific unmanned aerial system (UAS) market was led by the drone receptacle infrastructure segment in 2022. The segment's expansion is driven by the rising number of UAVs and UASs and their increasing applications across various sectors, including agriculture, logistics, surveillance, and transportation.

Segmentation 5: by Range

Visual-Line-of-Sight (VLOS)

Beyond-Visual-Line-of-Sight (BVLOS)

Visual-Line-of-Sight (VLOS) Segment to Dominate the Global and Asia-Pacific Unmanned Aerial System (UAS) Market (by Range)

The global and Asia-Pacific unmanned aerial system (UAS) market is led by the visual-line-of-sight (VLOS) range segment, which held a 65.12% share in 2022. The advanced autonomous VLOS drones with enhanced capabilities for various applications in both military and commercial sectors present in the market have been experiencing robust growth due to the increasing adoption of these technologies in various industries and the continuous development of advanced drones.

Segmentation 6: by Component

Airframe

Payload

Guidance Navigation Control

Propulsion Systems

Airframe Segment to Witness the Highest Growth between 2023 and 2033 in the Global and Asia-Pacific Unmanned Aerial System (UAS) Market (by Component)

The airframe component segment dominated the global and Asia-Pacific unmanned aerial system (UAS) market (by component) in 2022. Being the essential component of

the body of the UAV, the demand for this component is everlasting.

Segmentation 7: by Region

North America, Europe, and Rest-of-the-World

Asia-Pacific - Japan, Singapore, China, South Korea, Thailand, Indonesia, the Philippines, Vietnam, and Rest-of-Asia-Pacific

North America, Europe, and Rest-of-the-World were the highest-growing markets among all the regions, registering a CAGR of 14.87%. The regions are anticipated to gain traction in terms of UAS adoption owing to technological advancements, favorable economic conditions, and different consumer preferences. Moreover, favorable government policies are also expected to support the growth of the UAS market in North America, Europe, and Rest-of-the-World during the forecast period.

Recent Developments in the Global and Asia-Pacific Unmanned Aerial System (UAS) Market

In November 2022, the Israel Innovation Authority (IAA) unveiled the commencement of a second phase, amounting to \$17.5 million, for Israel's National Drone Initiative. This phase explored the applications of large cargo and passenger-carrying heavy drones operating within controlled airspace.

In March 2023, the China Aerospace Science and Technology Corp. delivered the first CH-4 combat drone system to the Democratic Republic of Congo (DRC) to aid Kinshasa in its efforts to combat rebels backed by Rwanda on the DRC territory. This deployment underscores a strategic move to enhance the DRC's military capabilities in addressing security challenges within its borders.

In February 2022, ST Engineering, Sumitomo Corporation, and Skyports collaborated to establish a consortium offering unmanned aircraft (UA) services for shore-to-ship parcel deliveries in Singapore. The consortium planned to leverage its combined operational and technological capabilities to enhance the use of autonomous UA for delivering maritime essentials to vessels at anchorage.

How can this report add value to an organization?

Product/Innovation Strategy: The product segment helps the reader understand the different types of products available for deployment and their potential globally. Moreover, the study provides the reader with a detailed understanding of the global and Asia-Pacific unmanned aerial system (UAS) market based on applications on the basis of application (commercial and government), products on the basis of drone type (fixed wing, rotary wing), mode of operation (remotely piloted, semi-autonomous, and autonomous), infrastructure (unmanned traffic management (UTM), and drone receptacle), range (visual-line-of-sight (VLOS), and beyond-visual-line-of-sight (BVLOS)), and component (airframe, payload, guidance navigation control, and propulsion system).

Growth/Marketing Strategy: The global and Asia-Pacific unmanned aerial system (UAS) market has seen major development by key players operating in the market, such as business expansion, partnership, collaboration, and joint venture. The favored strategy for the companies has been partnerships and contracts to strengthen their position in the global and Asia-Pacific unmanned aerial system (UAS) market. For instance, in July 2021, the Singapore Army unveiled its new Veloce 15 mini-unmanned aerial vehicles (V15 mini-UAV), featuring hybrid vertical take-off and landing (VTOL) capabilities. The V15 is the army's first locally developed hybrid fixed-wing VTOL platform.

Methodology: The research methodology design adopted for this specific study includes a mix of data collected from primary and secondary data sources. Both primary resources (key players, market leaders, and in-house experts) and secondary research (a host of paid and unpaid databases), along with analytical tools, are employed to build the predictive and forecast models.

Data and validation have been taken into consideration from both primary sources as well as secondary sources.

Key Considerations and Assumptions in Market Engineering and Validation

Detailed secondary research has been done to ensure maximum coverage of manufacturers/suppliers operational in a country.

Based on the classification, the average selling price (ASP) has been calculated using the weighted average method.

The currency conversion rate has been taken from the historical exchange rate of Oanda and/or other relevant websites.

Any economic downturn in the future has not been taken into consideration for the market estimation and forecast.

The base currency considered for the market analysis is US\$. Currencies other than the US\$ have been converted to the US\$ for all statistical calculations, considering the average conversion rate for that particular year.

The term “product” in this document may refer to “drone type” as and where relevant.

The term “manufacturers/suppliers” may refer to “systems providers” or “technology providers” as and where relevant.

Primary Research

The primary sources involve industry experts from the aerospace and defense industry, including drone manufacturers manufacturing for the commercial and/or government industry and UAS component manufacturers. Respondents such as CEOs, vice presidents, marketing directors, and technology and innovation directors have been interviewed to obtain and verify both qualitative and quantitative aspects of this research study.

Secondary Research

This study involves the usage of extensive secondary research, company websites, directories, and annual reports. It also makes use of databases, such as Spacenews, Businessweek, and others, to collect effective and useful information for a market-oriented, technical, commercial, and extensive study of the global market. In addition to the data sources, the study has been undertaken with the help of other data sources and websites, such as www.nasa.gov.

Secondary research was done to obtain critical information about the industry’s value chain, the market’s monetary chain, revenue models, the total pool of key players, and the current and potential use cases and applications.

Some prominent names established in this market are:

Draganfly Innovations Inc.

Skydio, Inc.

EHang

DJI

Elbit Systems Ltd.

Adani Group

AiviewGroup

HighEye

MMC

Hanwha Group

Terra Drone

Raptor Maps, Inc.

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