

Global Aerial Surveying & Mapping Services Supply, Demand and Key Producers, 2026-2032

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Abstracts

The global Aerial Surveying & Mapping Services market size is expected to reach \$ 3177 million by 2032, rising at a market growth of 4.7% CAGR during the forecast period (2026-2032).

Aerial Surveying & Mapping Services involve capturing high-resolution images and geospatial data from aircraft, drones, or satellites to create detailed maps and 3D models of landscapes, infrastructure, and urban areas. These services use technologies such as LiDAR (Light Detection and Ranging), photogrammetry, and multispectral imaging to collect precise elevation, topography, and land-use data. They are widely used in industries such as urban planning, construction, agriculture, environmental monitoring, and disaster management. Aerial surveying provides efficient, large-scale data collection with high accuracy, enabling better decision-making for infrastructure development, resource management, and environmental conservation.

Key Findings

Unmanned Aerial Vehicle (UAV) Surveying Services represent a rapidly expanding service category

Land Surveying and Transportation Infrastructure are major application areas

High-resolution spatial data and 3D mapping capabilities are key service differentiators

Regional markets show diversified demand driven by infrastructure and digital

mapping requirements

Market Trends

Aerial Surveying & Mapping Services are evolving from traditional image acquisition services toward integrated geospatial intelligence solutions combining aerial imaging, LiDAR, artificial intelligence-based processing, cloud platforms, and three-dimensional modeling. Customers increasingly require faster data delivery, higher spatial accuracy, automated processing workflows, and digital integration with geographic information systems and engineering platforms. UAV-based surveying is becoming more widely adopted due to operational flexibility, lower deployment requirements, and suitability for small-to-medium scale projects, while fixed-wing and helicopter platforms remain important for large-area coverage and complex terrain surveys. The industry is also moving toward more automated data interpretation, including AI-assisted feature extraction, change detection, infrastructure inspection, and asset management applications. Demand is increasingly shifting from standalone mapping outputs toward continuous monitoring and data-driven decision support services.

Market Dynamics

Drivers

The growth of Aerial Surveying & Mapping Services is driven by increasing demand for accurate geographic data in infrastructure development, urban expansion, environmental management, energy projects, and resource planning. Governments, engineering organizations, utilities, and enterprises require reliable spatial information to support construction planning, asset management, land administration, and operational decision-making. The expansion of transportation networks, renewable energy facilities, smart city initiatives, and digital transformation programs further increases the need for efficient aerial data collection. Advances in UAV technology, LiDAR systems, high-resolution sensors, and cloud-based processing platforms have improved survey efficiency while reducing operational barriers, allowing more organizations to adopt aerial surveying solutions.

Restraints

Market development is constrained by high equipment investment, technical complexity, regulatory restrictions, and dependence on skilled professionals. Aircraft operation, UAV flight approval, airspace management, sensor calibration, data processing, and quality control require specialized capabilities and compliance procedures. Large-scale projects may involve significant planning costs, while weather conditions and geographic accessibility can affect survey schedules. Data security, privacy concerns, and restrictions on aerial data collection in sensitive areas may also limit deployment in certain regions. In addition, competition from satellite imagery, traditional ground surveying, and other remote sensing technologies creates pressure on service providers to continuously improve accuracy, efficiency, and cost competitiveness.

Opportunities

Opportunities are emerging from the increasing adoption of digital twins, smart infrastructure management, automated inspection, environmental monitoring, and precision agriculture. Aerial Surveying & Mapping Services providers can expand value creation by integrating survey data with geographic information systems, engineering software, cloud platforms, and artificial intelligence analytics. Infrastructure owners increasingly require lifecycle monitoring solutions rather than one-time mapping projects, creating demand for recurring data services. Renewable energy development, urban redevelopment, disaster assessment, mining operations, and large-scale land management also provide additional growth opportunities. Providers with strong data processing capabilities, specialized industry knowledge, and integrated service offerings are positioned to capture higher-value projects.

Challenges

The industry faces challenges related to data accuracy requirements, project complexity, regulatory compliance, and increasing competition among technology providers. Different applications require different levels of resolution, accuracy, coverage, and processing speed, making standardization difficult. Service providers must continuously upgrade sensors, software capabilities, and processing methods while maintaining competitive pricing. The increasing use of automated platforms and new entrants with UAV-based solutions may intensify price competition, particularly in smaller projects. Long-term success requires maintaining technical expertise, regulatory capability, data security standards, and the ability to transform raw aerial data into actionable geographic intelligence.

Industry Chain Analysis

The upstream segment of the Aerial Surveying & Mapping Services industry chain includes aircraft and UAV platforms, cameras, LiDAR sensors, GNSS positioning systems, inertial measurement units, data storage equipment, processing software, cloud infrastructure, and geographic information technologies. The performance of upstream technologies directly influences survey accuracy, coverage efficiency, data quality, and processing capability. Sensor resolution, positioning accuracy, flight endurance, software algorithms, and computing infrastructure are critical factors affecting service quality and operating costs.

The midstream segment consists of aerial surveying service providers, geospatial companies, engineering consultants, and data processing specialists. These companies create value through flight planning, data acquisition, photogrammetry, LiDAR processing, mapping production, spatial analysis, and customized geographic solutions. Downstream customers include governments, construction companies, infrastructure operators, energy companies, agricultural organizations, mining enterprises, and environmental management agencies. Revenue models generally include project-based surveying contracts, recurring monitoring services, data processing services, and integrated geospatial solutions. Companies with advanced processing capabilities, strong industry expertise, regulatory experience, and long-term customer relationships typically achieve higher value creation.

Segment Insights

By platform type, Unmanned Aerial Vehicle (UAV) Surveying Services are becoming an important growth segment due to their flexibility, rapid deployment capability, lower operating requirements, and suitability for localized projects. UAV platforms are widely used where frequent data updates, detailed inspection, and flexible mission planning are required. Fixed-Wing Aircraft Surveying Services remain valuable for large-area mapping projects requiring extensive coverage efficiency, while Helicopter Surveying Services provide advantages in complex terrain, high-resolution acquisition, and specialized missions. Multi-Platform Integrated Surveying Services combine different platforms and sensors to optimize accuracy, coverage, and operational efficiency for complex projects.

By application, Land Surveying represents a fundamental demand area because accurate geographic information is required for land administration, construction planning, and resource management. Transportation Infrastructure applications benefit from aerial data for route planning, corridor mapping, maintenance inspection, and asset monitoring. Energy and Utilities increasingly use aerial surveying for power lines, pipelines, renewable energy facilities, and infrastructure inspection. Agriculture and Forestry applications are expanding through remote sensing, crop monitoring, vegetation analysis, and land management. Other applications continue to develop around environmental monitoring, disaster response, and specialized geospatial analysis.

Downstream Market Opportunities

Downstream opportunities for Aerial Surveying & Mapping Services are expanding as industries increasingly rely on accurate spatial data for planning, monitoring, and operational optimization. Transportation infrastructure and urban development require continuous mapping and asset inspection capabilities, while energy and utility operators use aerial data to improve network management and maintenance efficiency. Agriculture and forestry customers are adopting aerial surveying for resource monitoring, productivity improvement, and environmental assessment. Emerging opportunities include digital twin development, automated infrastructure inspection, disaster evaluation, climate monitoring, and real-time geospatial information services. Providers capable of combining data acquisition, processing, analytics, and industry-specific solutions can achieve stronger customer value and longer-term service relationships.

Regional Insights

Regional demand for Aerial Surveying & Mapping Services is influenced by infrastructure investment, urbanization levels, regulatory environments, technology adoption, and geographic characteristics. North America and Europe represent mature markets with strong demand from infrastructure management, environmental monitoring, utilities, and engineering applications. These regions emphasize data accuracy, regulatory compliance, advanced processing capabilities, and integration with professional engineering systems. Asia-Pacific is experiencing strong demand growth due to rapid infrastructure development, urban expansion, transportation investment, and increasing adoption of UAV-based surveying technologies.

Emerging markets in Asia, the Middle East, and other regions provide opportunities through infrastructure construction, natural resource management, agricultural modernization, and government mapping programs. Regional differences are reflected in project scale, regulatory requirements, technology adoption, and customer purchasing priorities. Markets with large geographic areas and expanding infrastructure networks create demand for efficient aerial data acquisition, while mature markets increasingly focus on analytics, monitoring services, and digital transformation applications.

Competitive Landscape Analysis

The Aerial Surveying & Mapping Services market includes global geospatial service providers, engineering consulting companies, remote sensing specialists, and regional mapping organizations. Fugro, Woolpert, NV5 Geospatial, Tetra Tech, SAM, Kokusai Kogyo, PASCO Corporation, EagleView Technologies, Nearmap, Atwell, Asia Air Survey, Westwood Professional Services, Vexcel Group, Applus+, Percheron, and other international participants compete through surveying expertise, sensor capabilities, data processing technologies, and industry-specific solutions. Regional companies such as China TopRS Technology Co., Ltd., China International Geomatics Co., Ltd., Feiyan Aerial Remote Sensing Technology Co., Ltd., Sichuan Zhongshui Chengkan Institute Surveying and Mapping Engineering Co., Ltd., Beijing Zhongkan Maipu Technology Co., Ltd., Guangzhou Lantu Geographic Information Technology Co., Ltd., and Beijing Jiexiang Tiandi Information Technology Co., Ltd. address localized surveying requirements and geographic information applications. Competitive differentiation increasingly depends on data accuracy, platform flexibility, processing efficiency, regulatory capability, industry specialization, and the ability to provide integrated geospatial solutions from data collection to decision support.

Report Scope

This report studies the global Aerial Surveying & Mapping Services demand, key companies, and key regions.

This report is a detailed and comprehensive analysis of the world market for Aerial Surveying & Mapping Services, and provides market size (US\$ million) and Year-over-Year (YoY) growth, considering 2025 as the base year. This report explores demand

trends and competition, as well as details the characteristics of Aerial Surveying & Mapping Services that contribute to its increasing demand across many markets.

Highlights and key features of the study

Global Aerial Surveying & Mapping Services total market, 2021-2032, (USD Million)

Global Aerial Surveying & Mapping Services total market by region & country, CAGR, 2021-2032, (USD Million)

U.S. VS China: Aerial Surveying & Mapping Services total market, key domestic companies, and share, (USD Million)

Global Aerial Surveying & Mapping Services revenue by player, revenue and market share 2021-2026, (USD Million)

Global Aerial Surveying & Mapping Services total market by Type, CAGR, 2021-2032, (USD Million)

Global Aerial Surveying & Mapping Services total market by Application, CAGR, 2021-2032, (USD Million)

This report profiles major players in the global Aerial Surveying & Mapping Services market based on the following parameters - company overview, revenue, gross margin, product portfolio, geographical presence, and key developments. Key companies covered as a part of this study include Fugro, Woolpert, NV5 Geospatial, PASCO Corporation, Tetra Tech, SAM, Kokusai Kogyo, EagleView Technologies, Nearmap, Atwell, etc.

This report also provides key insights about market drivers, restraints, opportunities, new product launches or approvals.

Stakeholders would have ease in decision-making through various strategy matrices used in analyzing the world Aerial Surveying & Mapping Services market

Detailed Segmentation:

Each section contains quantitative market data including market by value (US\$ Millions), by player, by regions, by Type, and by Application. Data is given for the years 2021-2032 by year with 2025 as the base year, 2026 as the estimate year, and 2027-2032 as the forecast year.

Global Aerial Surveying & Mapping Services Market, By Region:

United States

China

Europe

Japan

South Korea

ASEAN

India

Rest of World

Market Segmentation

Global Aerial Surveying & Mapping Services Market, Segmentation by Type:

Fixed-Wing Aircraft Surveying Services

Helicopter Surveying Services

Unmanned Aerial Vehicle (UAV) Surveying Services

Multi-Platform Integrated Surveying Services

Global Aerial Surveying & Mapping Services Market, Segmentation by Supply Source and Product Condition:

Aerial Surveying Services

Aerial Mapping Services

Integrated Surveying and Mapping Services

Data Processing and Geospatial Analysis Services

Global Aerial Surveying & Mapping Services Market, Segmentation by Survey Area per Project:

Small-Scale Projects: $\leq 50 \text{ km}^2$

Medium-Scale Projects: $50\text{--}500 \text{ km}^2$

Large-Scale Projects: $500\text{--}5,000 \text{ km}^2$

Ultra-Large Projects: $>5,000 \text{ km}^2$

Global Aerial Surveying & Mapping Services Market, Segmentation by Application:

Land Surveying

Urban Planning

Transportation Infrastructure

Energy and Utilities

Agriculture and Forestry

Others

Companies Profiled:

Fugro

Woolpert

NV5 Geospatial

PASCO Corporation

Tetra Tech

SAM

Kokusai Kogyo

EagleView Technologies

Nearmap

Atwell

Asia Air Survey

Westwood Professional Services

Vexcel Group

Applus+

Percheron

China TopRS Technology Co., Ltd.

Aerometrex

China International Geomatics Co., Ltd.

Kenn Borek Air

Getmapping

Feiyan Aerial Remote Sensing Technology Co., Ltd.

BSF Swissphoto

Landpoint

Sichuan Zhongshui Chengkan Institute Surveying and Mapping Engineering Co., Ltd.

Beijing Zhongkan Maipu Technology Co., Ltd.

Guangzhou Lantu Geographic Information Technology Co., Ltd.

Beijing Jiexiang Tiandi Information Technology Co., Ltd.

Goodland Surveys

Arya Geospatial

VMAPS Technologies

AB Surveying and Development

EMC, Inc.

ARC Aerial Imaging

Key Questions Answered

1. How big is the global Aerial Surveying & Mapping Services market?
2. What is the demand of the global Aerial Surveying & Mapping Services market?
3. What is the year over year growth of the global Aerial Surveying & Mapping Services market?
4. What is the total value of the global Aerial Surveying & Mapping Services market?
5. Who are the Major Players in the global Aerial Surveying & Mapping Services market?
6. What are the growth factors driving the market demand?

Contents

1 SUPPLY SUMMARY

- 1.1 Aerial Surveying & Mapping Services Introduction
- 1.2 World Aerial Surveying & Mapping Services Market Size & Forecast (2021 & 2025 & 2032)
- 1.3 World Aerial Surveying & Mapping Services Total Market by Region (by Headquarter Location)
 - 1.3.1 World Aerial Surveying & Mapping Services Market Size by Region (2021-2032), (by Headquarter Location)
 - 1.3.2 United States Based Company Aerial Surveying & Mapping Services Revenue (2021-2032)
 - 1.3.3 China Based Company Aerial Surveying & Mapping Services Revenue (2021-2032)
 - 1.3.4 Europe Based Company Aerial Surveying & Mapping Services Revenue (2021-2032)
 - 1.3.5 Japan Based Company Aerial Surveying & Mapping Services Revenue (2021-2032)
 - 1.3.6 South Korea Based Company Aerial Surveying & Mapping Services Revenue (2021-2032)
 - 1.3.7 ASEAN Based Company Aerial Surveying & Mapping Services Revenue (2021-2032)
 - 1.3.8 India Based Company Aerial Surveying & Mapping Services Revenue (2021-2032)
- 1.4 Market Drivers, Restraints and Trends
 - 1.4.1 Aerial Surveying & Mapping Services Market Drivers
 - 1.4.2 Factors Affecting Demand
 - 1.4.3 Major Market Trends

2 DEMAND SUMMARY

- 2.1 World Aerial Surveying & Mapping Services Consumption Value (2021-2032)
- 2.2 World Aerial Surveying & Mapping Services Consumption Value by Region
 - 2.2.1 World Aerial Surveying & Mapping Services Consumption Value by Region (2021-2026)
 - 2.2.2 World Aerial Surveying & Mapping Services Consumption Value Forecast by Region (2027-2032)
- 2.3 United States Aerial Surveying & Mapping Services Consumption Value

(2021-2032)

2.4 China Aerial Surveying & Mapping Services Consumption Value (2021-2032)

2.5 Europe Aerial Surveying & Mapping Services Consumption Value (2021-2032)

2.6 Japan Aerial Surveying & Mapping Services Consumption Value (2021-2032)

2.7 South Korea Aerial Surveying & Mapping Services Consumption Value (2021-2032)

2.8 ASEAN Aerial Surveying & Mapping Services Consumption Value (2021-2032)

2.9 India Aerial Surveying & Mapping Services Consumption Value (2021-2032)

3 WORLD AERIAL SURVEYING & MAPPING SERVICES COMPANIES COMPETITIVE ANALYSIS

3.1 World Aerial Surveying & Mapping Services Revenue by Player (2021-2026)

3.2 Industry Rank and Concentration Rate (CR)

3.2.1 Global Aerial Surveying & Mapping Services Industry Rank of Major Players

3.2.2 Global Concentration Ratios (CR4) for Aerial Surveying & Mapping Services in 2025

3.2.3 Global Concentration Ratios (CR8) for Aerial Surveying & Mapping Services in 2025

3.3 Aerial Surveying & Mapping Services Company Evaluation Quadrant

3.4 Aerial Surveying & Mapping Services Market: Overall Company Footprint Analysis

3.4.1 Aerial Surveying & Mapping Services Market: Region Footprint

3.4.2 Aerial Surveying & Mapping Services Market: Company Product Type Footprint

3.4.3 Aerial Surveying & Mapping Services Market: Company Product Application Footprint

3.5 Competitive Environment

3.5.1 Historical Structure of the Industry

3.5.2 Barriers of Market Entry

3.5.3 Factors of Competition

3.6 Mergers & Acquisitions Activity

4 UNITED STATES VS CHINA VS REST OF WORLD (BY HEADQUARTER LOCATION)

4.1 United States VS China: Aerial Surveying & Mapping Services Revenue Comparison (by Headquarter Location)

4.1.1 United States VS China: Aerial Surveying & Mapping Services Revenue Comparison (2021 & 2025 & 2032) (by Headquarter Location)

4.1.2 United States VS China: Aerial Surveying & Mapping Services Revenue Market Share Comparison (2021 & 2025 & 2032)

4.2 United States Based Companies VS China Based Companies: Aerial Surveying & Mapping Services Consumption Value Comparison

4.2.1 United States VS China: Aerial Surveying & Mapping Services Consumption Value Comparison (2021 & 2025 & 2032)

4.2.2 United States VS China: Aerial Surveying & Mapping Services Consumption Value Market Share Comparison (2021 & 2025 & 2032)

4.3 United States Based Aerial Surveying & Mapping Services Companies and Market Share, 2021-2026

4.3.1 United States Based Aerial Surveying & Mapping Services Companies, Headquarters (States, Country)

4.3.2 United States Based Companies Aerial Surveying & Mapping Services Revenue, (2021-2026)

4.4 China Based Companies Aerial Surveying & Mapping Services Revenue and Market Share, 2021-2026

4.4.1 China Based Aerial Surveying & Mapping Services Companies, Company Headquarters (Province, Country)

4.4.2 China Based Companies Aerial Surveying & Mapping Services Revenue, (2021-2026)

4.5 Rest of World Based Aerial Surveying & Mapping Services Companies and Market Share, 2021-2026

4.5.1 Rest of World Based Aerial Surveying & Mapping Services Companies, Headquarters (Province, Country)

4.5.2 Rest of World Based Companies Aerial Surveying & Mapping Services Revenue (2021-2026)

5 MARKET ANALYSIS BY TYPE

5.1 World Aerial Surveying & Mapping Services Market Size Overview by Type: 2021 VS 2025 VS 2032

5.2 Segment Introduction by Type

5.2.1 Fixed-Wing Aircraft Surveying Services

5.2.2 Helicopter Surveying Services

5.2.3 Unmanned Aerial Vehicle (UAV) Surveying Services

5.2.4 Multi-Platform Integrated Surveying Services

5.3 Market Segment by Type

5.3.1 World Aerial Surveying & Mapping Services Market Size by Type (2021-2026)

5.3.2 World Aerial Surveying & Mapping Services Market Size by Type (2027-2032)

5.3.3 World Aerial Surveying & Mapping Services Market Size Market Share by Type (2027-2032)

6 MARKET ANALYSIS BY SUPPLY SOURCE AND PRODUCT CONDITION

6.1 World Aerial Surveying & Mapping Services Market Size Overview by Supply Source and Product Condition: 2021 VS 2025 VS 2032

6.2 Segment Introduction by Supply Source and Product Condition

6.2.1 Aerial Surveying Services

6.2.2 Aerial Mapping Services

6.2.3 Integrated Surveying and Mapping Services

6.2.4 Data Processing and Geospatial Analysis Services

6.3 Market Segment by Supply Source and Product Condition

6.3.1 World Aerial Surveying & Mapping Services Market Size by Supply Source and Product Condition (2021-2026)

6.3.2 World Aerial Surveying & Mapping Services Market Size by Supply Source and Product Condition (2027-2032)

6.3.3 World Aerial Surveying & Mapping Services Market Size Market Share by Supply Source and Product Condition (2027-2032)

7 MARKET ANALYSIS BY SURVEY AREA PER PROJECT

7.1 World Aerial Surveying & Mapping Services Market Size Overview by Survey Area per Project: 2021 VS 2025 VS 2032

7.2 Segment Introduction by Survey Area per Project

7.2.1 Small-Scale Projects: ?50 km²

7.2.2 Medium-Scale Projects: 50–500 km²

7.2.3 Large-Scale Projects: 500–5,000 km²

7.2.4 Ultra-Large Projects: >5,000 km²

7.3 Market Segment by Survey Area per Project

7.3.1 World Aerial Surveying & Mapping Services Market Size by Survey Area per Project (2021-2026)

7.3.2 World Aerial Surveying & Mapping Services Market Size by Survey Area per Project (2027-2032)

7.3.3 World Aerial Surveying & Mapping Services Market Size Market Share by Survey Area per Project (2027-2032)

8 MARKET ANALYSIS BY APPLICATION

8.1 World Aerial Surveying & Mapping Services Market Size Overview by Application: 2021 VS 2025 VS 2032

8.2 Segment Introduction by Application

8.2.1 Land Surveying

8.2.2 Urban Planning

8.2.3 Transportation Infrastructure

8.2.4 Energy and Utilities

8.2.5 Agriculture and Forestry

8.2.6 Others

8.3 Market Segment by Application

8.3.1 World Aerial Surveying & Mapping Services Market Size by Application (2021-2026)

8.3.2 World Aerial Surveying & Mapping Services Market Size by Application (2027-2032)

8.3.3 World Aerial Surveying & Mapping Services Market Size Market Share by Application (2021-2032)

9 COMPANY PROFILES

9.1 Fugro

9.1.1 Fugro Details

9.1.2 Fugro Major Business

9.1.3 Fugro Aerial Surveying & Mapping Services Product and Services

9.1.4 Fugro Aerial Surveying & Mapping Services Revenue, Gross Margin and Market Share (2021-2026)

9.1.5 Fugro Recent Developments/Updates

9.1.6 Fugro Competitive Strengths & Weaknesses

9.2 Woolpert

9.2.1 Woolpert Details

9.2.2 Woolpert Major Business

9.2.3 Woolpert Aerial Surveying & Mapping Services Product and Services

9.2.4 Woolpert Aerial Surveying & Mapping Services Revenue, Gross Margin and Market Share (2021-2026)

9.2.5 Woolpert Recent Developments/Updates

9.2.6 Woolpert Competitive Strengths & Weaknesses

9.3 NV5 Geospatial

9.3.1 NV5 Geospatial Details

9.3.2 NV5 Geospatial Major Business

9.3.3 NV5 Geospatial Aerial Surveying & Mapping Services Product and Services

9.3.4 NV5 Geospatial Aerial Surveying & Mapping Services Revenue, Gross Margin and Market Share (2021-2026)

9.3.5 NV5 Geospatial Recent Developments/Updates

9.3.6 NV5 Geospatial Competitive Strengths & Weaknesses

9.4 PASCO Corporation

9.4.1 PASCO Corporation Details

9.4.2 PASCO Corporation Major Business

9.4.3 PASCO Corporation Aerial Surveying & Mapping Services Product and Services

9.4.4 PASCO Corporation Aerial Surveying & Mapping Services Revenue, Gross

Margin and Market Share (2021-2026)

9.4.5 PASCO Corporation Recent Developments/Updates

9.4.6 PASCO Corporation Competitive Strengths & Weaknesses

9.5 Tetra Tech

9.5.1 Tetra Tech Details

9.5.2 Tetra Tech Major Business

9.5.3 Tetra Tech Aerial Surveying & Mapping Services Product and Services

9.5.4 Tetra Tech Aerial Surveying & Mapping Services Revenue, Gross Margin and

Market Share (2021-2026)

9.5.5 Tetra Tech Recent Developments/Updates

9.5.6 Tetra Tech Competitive Strengths & Weaknesses

9.6 SAM

9.6.1 SAM Details

9.6.2 SAM Major Business

9.6.3 SAM Aerial Surveying & Mapping Services Product and Services

9.6.4 SAM Aerial Surveying & Mapping Services Revenue, Gross Margin and Market

Share (2021-2026)

9.6.5 SAM Recent Developments/Updates

9.6.6 SAM Competitive Strengths & Weaknesses

9.7 Kokusai Kogyo

9.7.1 Kokusai Kogyo Details

9.7.2 Kokusai Kogyo Major Business

9.7.3 Kokusai Kogyo Aerial Surveying & Mapping Services Product and Services

9.7.4 Kokusai Kogyo Aerial Surveying & Mapping Services Revenue, Gross Margin

and Market Share (2021-2026)

9.7.5 Kokusai Kogyo Recent Developments/Updates

9.7.6 Kokusai Kogyo Competitive Strengths & Weaknesses

9.8 EagleView Technologies

9.8.1 EagleView Technologies Details

9.8.2 EagleView Technologies Major Business

9.8.3 EagleView Technologies Aerial Surveying & Mapping Services Product and

Services

9.8.4 EagleView Technologies Aerial Surveying & Mapping Services Revenue, Gross Margin and Market Share (2021-2026)

9.8.5 EagleView Technologies Recent Developments/Updates

9.8.6 EagleView Technologies Competitive Strengths & Weaknesses

9.9 Nearmap

9.9.1 Nearmap Details

9.9.2 Nearmap Major Business

9.9.3 Nearmap Aerial Surveying & Mapping Services Product and Services

9.9.4 Nearmap Aerial Surveying & Mapping Services Revenue, Gross Margin and Market Share (2021-2026)

9.9.5 Nearmap Recent Developments/Updates

9.9.6 Nearmap Competitive Strengths & Weaknesses

9.10 Atwell

9.10.1 Atwell Details

9.10.2 Atwell Major Business

9.10.3 Atwell Aerial Surveying & Mapping Services Product and Services

9.10.4 Atwell Aerial Surveying & Mapping Services Revenue, Gross Margin and Market Share (2021-2026)

9.10.5 Atwell Recent Developments/Updates

9.10.6 Atwell Competitive Strengths & Weaknesses

9.11 Asia Air Survey

9.11.1 Asia Air Survey Details

9.11.2 Asia Air Survey Major Business

9.11.3 Asia Air Survey Aerial Surveying & Mapping Services Product and Services

9.11.4 Asia Air Survey Aerial Surveying & Mapping Services Revenue, Gross Margin and Market Share (2021-2026)

9.11.5 Asia Air Survey Recent Developments/Updates

9.11.6 Asia Air Survey Competitive Strengths & Weaknesses

9.12 Westwood Professional Services

9.12.1 Westwood Professional Services Details

9.12.2 Westwood Professional Services Major Business

9.12.3 Westwood Professional Services Aerial Surveying & Mapping Services Product and Services

9.12.4 Westwood Professional Services Aerial Surveying & Mapping Services Revenue, Gross Margin and Market Share (2021-2026)

9.12.5 Westwood Professional Services Recent Developments/Updates

9.12.6 Westwood Professional Services Competitive Strengths & Weaknesses

9.13 Vexcel Group

9.13.1 Vexcel Group Details

- 9.13.2 Vexcel Group Major Business
- 9.13.3 Vexcel Group Aerial Surveying & Mapping Services Product and Services
- 9.13.4 Vexcel Group Aerial Surveying & Mapping Services Revenue, Gross Margin and Market Share (2021-2026)
- 9.13.5 Vexcel Group Recent Developments/Updates
- 9.13.6 Vexcel Group Competitive Strengths & Weaknesses
- 9.14 Applus+
- 9.14.1 Applus+ Details
- 9.14.2 Applus+ Major Business
- 9.14.3 Applus+ Aerial Surveying & Mapping Services Product and Services
- 9.14.4 Applus+ Aerial Surveying & Mapping Services Revenue, Gross Margin and Market Share (2021-2026)
- 9.14.5 Applus+ Recent Developments/Updates
- 9.14.6 Applus+ Competitive Strengths & Weaknesses
- 9.15 Percheron
- 9.15.1 Percheron Details
- 9.15.2 Percheron Major Business
- 9.15.3 Percheron Aerial Surveying & Mapping Services Product and Services
- 9.15.4 Percheron Aerial Surveying & Mapping Services Revenue, Gross Margin and Market Share (2021-2026)
- 9.15.5 Percheron Recent Developments/Updates
- 9.15.6 Percheron Competitive Strengths & Weaknesses
- 9.16 China TopRS Technology Co., Ltd.
- 9.16.1 China TopRS Technology Co., Ltd. Details
- 9.16.2 China TopRS Technology Co., Ltd. Major Business
- 9.16.3 China TopRS Technology Co., Ltd. Aerial Surveying & Mapping Services Product and Services
- 9.16.4 China TopRS Technology Co., Ltd. Aerial Surveying & Mapping Services Revenue, Gross Margin and Market Share (2021-2026)
- 9.16.5 China TopRS Technology Co., Ltd. Recent Developments/Updates
- 9.16.6 China TopRS Technology Co., Ltd. Competitive Strengths & Weaknesses
- 9.17 Aerometrex
- 9.17.1 Aerometrex Details
- 9.17.2 Aerometrex Major Business
- 9.17.3 Aerometrex Aerial Surveying & Mapping Services Product and Services
- 9.17.4 Aerometrex Aerial Surveying & Mapping Services Revenue, Gross Margin and Market Share (2021-2026)
- 9.17.5 Aerometrex Recent Developments/Updates
- 9.17.6 Aerometrex Competitive Strengths & Weaknesses

9.18 China International Geomatics Co., Ltd.

9.18.1 China International Geomatics Co., Ltd. Details

9.18.2 China International Geomatics Co., Ltd. Major Business

9.18.3 China International Geomatics Co., Ltd. Aerial Surveying & Mapping Services Product and Services

9.18.4 China International Geomatics Co., Ltd. Aerial Surveying & Mapping Services Revenue, Gross Margin and Market Share (2021-2026)

9.18.5 China International Geomatics Co., Ltd. Recent Developments/Updates

9.18.6 China International Geomatics Co., Ltd. Competitive Strengths & Weaknesses

9.19 Kenn Borek Air

9.19.1 Kenn Borek Air Details

9.19.2 Kenn Borek Air Major Business

9.19.3 Kenn Borek Air Aerial Surveying & Mapping Services Product and Services

9.19.4 Kenn Borek Air Aerial Surveying & Mapping Services Revenue, Gross Margin and Market Share (2021-2026)

9.19.5 Kenn Borek Air Recent Developments/Updates

9.19.6 Kenn Borek Air Competitive Strengths & Weaknesses

9.20 Getmapping

9.20.1 Getmapping Details

9.20.2 Getmapping Major Business

9.20.3 Getmapping Aerial Surveying & Mapping Services Product and Services

9.20.4 Getmapping Aerial Surveying & Mapping Services Revenue, Gross Margin and Market Share (2021-2026)

9.20.5 Getmapping Recent Developments/Updates

9.20.6 Getmapping Competitive Strengths & Weaknesses

9.21 Feiyan Aerial Remote Sensing Technology Co., Ltd.

9.21.1 Feiyan Aerial Remote Sensing Technology Co., Ltd. Details

9.21.2 Feiyan Aerial Remote Sensing Technology Co., Ltd. Major Business

9.21.3 Feiyan Aerial Remote Sensing Technology Co., Ltd. Aerial Surveying & Mapping Services Product and Services

9.21.4 Feiyan Aerial Remote Sensing Technology Co., Ltd. Aerial Surveying & Mapping Services Revenue, Gross Margin and Market Share (2021-2026)

9.21.5 Feiyan Aerial Remote Sensing Technology Co., Ltd. Recent Developments/Updates

9.21.6 Feiyan Aerial Remote Sensing Technology Co., Ltd. Competitive Strengths & Weaknesses

9.22 BSF Swissphoto

9.22.1 BSF Swissphoto Details

9.22.2 BSF Swissphoto Major Business

- 9.22.3 BSF Swissphoto Aerial Surveying & Mapping Services Product and Services
- 9.22.4 BSF Swissphoto Aerial Surveying & Mapping Services Revenue, Gross Margin and Market Share (2021-2026)
- 9.22.5 BSF Swissphoto Recent Developments/Updates
- 9.22.6 BSF Swissphoto Competitive Strengths & Weaknesses
- 9.23 Landpoint
 - 9.23.1 Landpoint Details
 - 9.23.2 Landpoint Major Business
 - 9.23.3 Landpoint Aerial Surveying & Mapping Services Product and Services
 - 9.23.4 Landpoint Aerial Surveying & Mapping Services Revenue, Gross Margin and Market Share (2021-2026)
 - 9.23.5 Landpoint Recent Developments/Updates
 - 9.23.6 Landpoint Competitive Strengths & Weaknesses
- 9.24 Sichuan Zhongshui Chengkan Institute Surveying and Mapping Engineering Co., Ltd.
 - 9.24.1 Sichuan Zhongshui Chengkan Institute Surveying and Mapping Engineering Co., Ltd. Details
 - 9.24.2 Sichuan Zhongshui Chengkan Institute Surveying and Mapping Engineering Co., Ltd. Major Business
 - 9.24.3 Sichuan Zhongshui Chengkan Institute Surveying and Mapping Engineering Co., Ltd. Aerial Surveying & Mapping Services Product and Services
 - 9.24.4 Sichuan Zhongshui Chengkan Institute Surveying and Mapping Engineering Co., Ltd. Aerial Surveying & Mapping Services Revenue, Gross Margin and Market Share (2021-2026)
 - 9.24.5 Sichuan Zhongshui Chengkan Institute Surveying and Mapping Engineering Co., Ltd. Recent Developments/Updates
 - 9.24.6 Sichuan Zhongshui Chengkan Institute Surveying and Mapping Engineering Co., Ltd. Competitive Strengths & Weaknesses
- 9.25 Beijing Zhongkan Maipu Technology Co., Ltd.
 - 9.25.1 Beijing Zhongkan Maipu Technology Co., Ltd. Details
 - 9.25.2 Beijing Zhongkan Maipu Technology Co., Ltd. Major Business
 - 9.25.3 Beijing Zhongkan Maipu Technology Co., Ltd. Aerial Surveying & Mapping Services Product and Services
 - 9.25.4 Beijing Zhongkan Maipu Technology Co., Ltd. Aerial Surveying & Mapping Services Revenue, Gross Margin and Market Share (2021-2026)
 - 9.25.5 Beijing Zhongkan Maipu Technology Co., Ltd. Recent Developments/Updates
 - 9.25.6 Beijing Zhongkan Maipu Technology Co., Ltd. Competitive Strengths & Weaknesses
- 9.26 Guangzhou Lantu Geographic Information Technology Co., Ltd.

- 9.26.1 Guangzhou Lantu Geographic Information Technology Co., Ltd. Details
- 9.26.2 Guangzhou Lantu Geographic Information Technology Co., Ltd. Major Business
- 9.26.3 Guangzhou Lantu Geographic Information Technology Co., Ltd. Aerial Surveying & Mapping Services Product and Services
- 9.26.4 Guangzhou Lantu Geographic Information Technology Co., Ltd. Aerial Surveying & Mapping Services Revenue, Gross Margin and Market Share (2021-2026)
- 9.26.5 Guangzhou Lantu Geographic Information Technology Co., Ltd. Recent Developments/Updates
- 9.26.6 Guangzhou Lantu Geographic Information Technology Co., Ltd. Competitive Strengths & Weaknesses
- 9.27 Beijing Jiexiang Tiandi Information Technology Co., Ltd.
 - 9.27.1 Beijing Jiexiang Tiandi Information Technology Co., Ltd. Details
 - 9.27.2 Beijing Jiexiang Tiandi Information Technology Co., Ltd. Major Business
 - 9.27.3 Beijing Jiexiang Tiandi Information Technology Co., Ltd. Aerial Surveying & Mapping Services Product and Services
 - 9.27.4 Beijing Jiexiang Tiandi Information Technology Co., Ltd. Aerial Surveying & Mapping Services Revenue, Gross Margin and Market Share (2021-2026)
 - 9.27.5 Beijing Jiexiang Tiandi Information Technology Co., Ltd. Recent Developments/Updates
 - 9.27.6 Beijing Jiexiang Tiandi Information Technology Co., Ltd. Competitive Strengths & Weaknesses
- 9.28 Goodland Surveys
 - 9.28.1 Goodland Surveys Details
 - 9.28.2 Goodland Surveys Major Business
 - 9.28.3 Goodland Surveys Aerial Surveying & Mapping Services Product and Services
 - 9.28.4 Goodland Surveys Aerial Surveying & Mapping Services Revenue, Gross Margin and Market Share (2021-2026)
 - 9.28.5 Goodland Surveys Recent Developments/Updates
 - 9.28.6 Goodland Surveys Competitive Strengths & Weaknesses
- 9.29 Arya Geospatial
 - 9.29.1 Arya Geospatial Details
 - 9.29.2 Arya Geospatial Major Business
 - 9.29.3 Arya Geospatial Aerial Surveying & Mapping Services Product and Services
 - 9.29.4 Arya Geospatial Aerial Surveying & Mapping Services Revenue, Gross Margin and Market Share (2021-2026)
 - 9.29.5 Arya Geospatial Recent Developments/Updates
 - 9.29.6 Arya Geospatial Competitive Strengths & Weaknesses
- 9.30 VMAPS Technologies
 - 9.30.1 VMAPS Technologies Details

- 9.30.2 VMAPS Technologies Major Business
- 9.30.3 VMAPS Technologies Aerial Surveying & Mapping Services Product and Services
- 9.30.4 VMAPS Technologies Aerial Surveying & Mapping Services Revenue, Gross Margin and Market Share (2021-2026)
- 9.30.5 VMAPS Technologies Recent Developments/Updates
- 9.30.6 VMAPS Technologies Competitive Strengths & Weaknesses
- 9.31 AB Surveying and Development
 - 9.31.1 AB Surveying and Development Details
 - 9.31.2 AB Surveying and Development Major Business
 - 9.31.3 AB Surveying and Development Aerial Surveying & Mapping Services Product and Services
 - 9.31.4 AB Surveying and Development Aerial Surveying & Mapping Services Revenue, Gross Margin and Market Share (2021-2026)
 - 9.31.5 AB Surveying and Development Recent Developments/Updates
 - 9.31.6 AB Surveying and Development Competitive Strengths & Weaknesses
- 9.32 EMC, Inc.
 - 9.32.1 EMC, Inc. Details
 - 9.32.2 EMC, Inc. Major Business
 - 9.32.3 EMC, Inc. Aerial Surveying & Mapping Services Product and Services
 - 9.32.4 EMC, Inc. Aerial Surveying & Mapping Services Revenue, Gross Margin and Market Share (2021-2026)
 - 9.32.5 EMC, Inc. Recent Developments/Updates
 - 9.32.6 EMC, Inc. Competitive Strengths & Weaknesses
- 9.33 ARC Aerial Imaging
 - 9.33.1 ARC Aerial Imaging Details
 - 9.33.2 ARC Aerial Imaging Major Business
 - 9.33.3 ARC Aerial Imaging Aerial Surveying & Mapping Services Product and Services
 - 9.33.4 ARC Aerial Imaging Aerial Surveying & Mapping Services Revenue, Gross Margin and Market Share (2021-2026)
 - 9.33.5 ARC Aerial Imaging Recent Developments/Updates
 - 9.33.6 ARC Aerial Imaging Competitive Strengths & Weaknesses

10 INDUSTRY CHAIN ANALYSIS

- 10.1 Aerial Surveying & Mapping Services Industry Chain
- 10.2 Aerial Surveying & Mapping Services Upstream Analysis
- 10.3 Aerial Surveying & Mapping Services Midstream Analysis
- 10.4 Aerial Surveying & Mapping Services Downstream Analysis

11 RESEARCH FINDINGS AND CONCLUSION

12 APPENDIX

12.1 Methodology

12.2 Research Process and Data Source

12.3 Disclaimer

List Of Tables

LIST OF TABLES

Table 1. World Aerial Surveying & Mapping Services Revenue by Region (2021, 2025 and 2032) & (USD Million), (by Headquarter Location)

Table 2. World Aerial Surveying & Mapping Services Revenue by Region (2021-2026) & (USD Million), (by Headquarter Location)

Table 3. World Aerial Surveying & Mapping Services Revenue by Region (2027-2032) & (USD Million), (by Headquarter Location)

Table 4. World Aerial Surveying & Mapping Services Revenue Market Share by Region (2021-2026), (by Headquarter Location)

Table 5. World Aerial Surveying & Mapping Services Revenue Market Share by Region (2027-2032), (by Headquarter Location)

Table 6. Major Market Trends

Table 7. World Aerial Surveying & Mapping Services Consumption Value Growth Rate Forecast by Region (2021 & 2025 & 2032) & (USD Million)

Table 8. World Aerial Surveying & Mapping Services Consumption Value by Region (2021-2026) & (USD Million)

Table 9. World Aerial Surveying & Mapping Services Consumption Value Forecast by Region (2027-2032) & (USD Million)

Table 10. World Aerial Surveying & Mapping Services Revenue by Player (2021-2026) & (USD Million)

Table 11. Revenue Market Share of Key Aerial Surveying & Mapping Services Players in 2025

Table 12. World Aerial Surveying & Mapping Services Industry Rank of Major Player, Based on Revenue in 2025

Table 13. Global Aerial Surveying & Mapping Services Company Evaluation Quadrant

Table 14. Head Office of Key Aerial Surveying & Mapping Services Players

Table 15. Aerial Surveying & Mapping Services Market: Company Product Type Footprint

Table 16. Aerial Surveying & Mapping Services Market: Company Product Application Footprint

Table 17. Aerial Surveying & Mapping Services Mergers & Acquisitions Activity

Table 18. United States VS China Aerial Surveying & Mapping Services Revenue Comparison, (2021 & 2025 & 2032) & (USD Million)

Table 19. United States VS China Aerial Surveying & Mapping Services Consumption Value Comparison, (2021 & 2025 & 2032) & (USD Million)

Table 20. United States Based Aerial Surveying & Mapping Services Companies,

Headquarters (States, Country)

Table 21. United States Based Companies Aerial Surveying & Mapping Services Revenue, (2021-2026) & (USD Million)

Table 22. United States Based Companies Aerial Surveying & Mapping Services Revenue Market Share (2021-2026)

Table 23. China Based Aerial Surveying & Mapping Services Companies, Headquarters (Province, Country)

Table 24. China Based Companies Aerial Surveying & Mapping Services Revenue, (2021-2026) & (USD Million)

Table 25. China Based Companies Aerial Surveying & Mapping Services Revenue Market Share (2021-2026)

Table 26. Rest of World Based Aerial Surveying & Mapping Services Companies, Headquarters (Province, Country)

Table 27. Rest of World Based Companies Aerial Surveying & Mapping Services Revenue (2021-2026) & (USD Million)

Table 28. Rest of World Based Companies Aerial Surveying & Mapping Services Revenue Market Share (2021-2026)

Table 29. World Aerial Surveying & Mapping Services Market Size by Type, (USD Million), 2021 & 2025 & 2032

Table 30. World Aerial Surveying & Mapping Services Market Size Value by Type (2021-2026) & (USD Million)

Table 31. World Aerial Surveying & Mapping Services Market Size by Type (2027-2032) & (USD Million)

Table 32. World Aerial Surveying & Mapping Services Market Size by Supply Source and Product Condition, (USD Million), 2021 & 2025 & 2032

Table 33. World Aerial Surveying & Mapping Services Market Size Value by Supply Source and Product Condition (2021-2026) & (USD Million)

Table 34. World Aerial Surveying & Mapping Services Market Size by Supply Source and Product Condition (2027-2032) & (USD Million)

Table 35. World Aerial Surveying & Mapping Services Market Size by Survey Area per Project, (USD Million), 2021 & 2025 & 2032

Table 36. World Aerial Surveying & Mapping Services Market Size Value by Survey Area per Project (2021-2026) & (USD Million)

Table 37. World Aerial Surveying & Mapping Services Market Size by Survey Area per Project (2027-2032) & (USD Million)

Table 38. World Aerial Surveying & Mapping Services Market Size by Application, (USD Million), 2021 & 2025 & 2032

Table 39. World Aerial Surveying & Mapping Services Market Size by Application (2021-2026) & (USD Million)

Table 40. World Aerial Surveying & Mapping Services Market Size by Application (2027-2032) & (USD Million)

Table 41. Fugro Basic Information, Manufacturing Base and Competitors

Table 42. Fugro Major Business

Table 43. Fugro Aerial Surveying & Mapping Services Product and Services

Table 44. Fugro Aerial Surveying & Mapping Services Revenue, Gross Margin and Market Share (2021-2026) & (USD Million)

Table 45. Fugro Recent Developments/Updates

Table 46. Fugro Competitive Strengths & Weaknesses

Table 47. Woolpert Basic Information, Manufacturing Base and Competitors

Table 48. Woolpert Major Business

Table 49. Woolpert Aerial Surveying & Mapping Services Product and Services

Table 50. Woolpert Aerial Surveying & Mapping Services Revenue, Gross Margin and Market Share (2021-2026) & (USD Million)

Table 51. Woolpert Recent Developments/Updates

Table 52. Woolpert Competitive Strengths & Weaknesses

Table 53. NV5 Geospatial Basic Information, Manufacturing Base and Competitors

Table 54. NV5 Geospatial Major Business

Table 55. NV5 Geospatial Aerial Surveying & Mapping Services Product and Services

Table 56. NV5 Geospatial Aerial Surveying & Mapping Services Revenue, Gross Margin and Market Share (2021-2026) & (USD Million)

Table 57. NV5 Geospatial Recent Developments/Updates

Table 58. NV5 Geospatial Competitive Strengths & Weaknesses

Table 59. PASCO Corporation Basic Information, Manufacturing Base and Competitors

Table 60. PASCO Corporation Major Business

Table 61. PASCO Corporation Aerial Surveying & Mapping Services Product and Services

Table 62. PASCO Corporation Aerial Surveying & Mapping Services Revenue, Gross Margin and Market Share (2021-2026) & (USD Million)

Table 63. PASCO Corporation Recent Developments/Updates

Table 64. PASCO Corporation Competitive Strengths & Weaknesses

Table 65. Tetra Tech Basic Information, Manufacturing Base and Competitors

Table 66. Tetra Tech Major Business

Table 67. Tetra Tech Aerial Surveying & Mapping Services Product and Services

Table 68. Tetra Tech Aerial Surveying & Mapping Services Revenue, Gross Margin and Market Share (2021-2026) & (USD Million)

Table 69. Tetra Tech Recent Developments/Updates

Table 70. Tetra Tech Competitive Strengths & Weaknesses

Table 71. SAM Basic Information, Manufacturing Base and Competitors

Table 72. SAM Major Business

Table 73. SAM Aerial Surveying & Mapping Services Product and Services

Table 74. SAM Aerial Surveying & Mapping Services Revenue, Gross Margin and Market Share (2021-2026) & (USD Million)

Table 75. SAM Recent Developments/Updates

Table 76. SAM Competitive Strengths & Weaknesses

Table 77. Kokusai Kogyo Basic Information, Manufacturing Base and Competitors

Table 78. Kokusai Kogyo Major Business

Table 79. Kokusai Kogyo Aerial Surveying & Mapping Services Product and Services

Table 80. Kokusai Kogyo Aerial Surveying & Mapping Services Revenue, Gross Margin and Market Share (2021-2026) & (USD Million)

Table 81. Kokusai Kogyo Recent Developments/Updates

Table 82. Kokusai Kogyo Competitive Strengths & Weaknesses

Table 83. EagleView Technologies Basic Information, Manufacturing Base and Competitors

Table 84. EagleView Technologies Major Business

Table 85. EagleView Technologies Aerial Surveying & Mapping Services Product and Services

Table 86. EagleView Technologies Aerial Surveying & Mapping Services Revenue, Gross Margin and Market Share (2021-2026) & (USD Million)

Table 87. EagleView Technologies Recent Developments/Updates

Table 88. EagleView Technologies Competitive Strengths & Weaknesses

Table 89. Nearmap Basic Information, Manufacturing Base and Competitors

Table 90. Nearmap Major Business

Table 91. Nearmap Aerial Surveying & Mapping Services Product and Services

Table 92. Nearmap Aerial Surveying & Mapping Services Revenue, Gross Margin and Market Share (2021-2026) & (USD Million)

Table 93. Nearmap Recent Developments/Updates

Table 94. Nearmap Competitive Strengths & Weaknesses

Table 95. Atwell Basic Information, Manufacturing Base and Competitors

Table 96. Atwell Major Business

Table 97. Atwell Aerial Surveying & Mapping Services Product and Services

Table 98. Atwell Aerial Surveying & Mapping Services Revenue, Gross Margin and Market Share (2021-2026) & (USD Million)

Table 99. Atwell Recent Developments/Updates

Table 100. Atwell Competitive Strengths & Weaknesses

Table 101. Asia Air Survey Basic Information, Manufacturing Base and Competitors

Table 102. Asia Air Survey Major Business

Table 103. Asia Air Survey Aerial Surveying & Mapping Services Product and Services

Table 104. Asia Air Survey Aerial Surveying & Mapping Services Revenue, Gross Margin and Market Share (2021-2026) & (USD Million)

Table 105. Asia Air Survey Recent Developments/Updates

Table 106. Asia Air Survey Competitive Strengths & Weaknesses

Table 107. Westwood Professional Services Basic Information, Manufacturing Base and Competitors

Table 108. Westwood Professional Services Major Business

Table 109. Westwood Professional Services Aerial Surveying & Mapping Services Product and Services

Table 110. Westwood Professional Services Aerial Surveying & Mapping Services Revenue, Gross Margin and Market Share (2021-2026) & (USD Million)

Table 111. Westwood Professional Services Recent Developments/Updates

Table 112. Westwood Professional Services Competitive Strengths & Weaknesses

Table 113. Vexcel Group Basic Information, Manufacturing Base and Competitors

Table 114. Vexcel Group Major Business

Table 115. Vexcel Group Aerial Surveying & Mapping Services Product and Services

Table 116. Vexcel Group Aerial Surveying & Mapping Services Revenue, Gross Margin and Market Share (2021-2026) & (USD Million)

Table 117. Vexcel Group Recent Developments/Updates

Table 118. Vexcel Group Competitive Strengths & Weaknesses

Table 119. Applus+ Basic Information, Manufacturing Base and Competitors

Table 120. Applus+ Major Business

Table 121. Applus+ Aerial Surveying & Mapping Services Product and Services

Table 122. Applus+ Aerial Surveying & Mapping Services Revenue, Gross Margin and Market Share (2021-2026) & (USD Million)

Table 123. Applus+ Recent Developments/Updates

Table 124. Applus+ Competitive Strengths & Weaknesses

Table 125. Percheron Basic Information, Manufacturing Base and Competitors

Table 126. Percheron Major Business

Table 127. Percheron Aerial Surveying & Mapping Services Product and Services

Table 128. Percheron Aerial Surveying & Mapping Services Revenue, Gross Margin and Market Share (2021-2026) & (USD Million)

Table 129. Percheron Recent Developments/Updates

Table 130. Percheron Competitive Strengths & Weaknesses

Table 131. China TopRS Technology Co., Ltd. Basic Information, Manufacturing Base and Competitors

Table 132. China TopRS Technology Co., Ltd. Major Business

Table 133. China TopRS Technology Co., Ltd. Aerial Surveying & Mapping Services Product and Services

Table 134. China TopRS Technology Co., Ltd. Aerial Surveying & Mapping Services Revenue, Gross Margin and Market Share (2021-2026) & (USD Million)

Table 135. China TopRS Technology Co., Ltd. Recent Developments/Updates

Table 136. China TopRS Technology Co., Ltd. Competitive Strengths & Weaknesses

Table 137. Aerometrex Basic Information, Manufacturing Base and Competitors

Table 138. Aerometrex Major Business

Table 139. Aerometrex Aerial Surveying & Mapping Services Product and Services

Table 140. Aerometrex Aerial Surveying & Mapping Services Revenue, Gross Margin and Market Share (2021-2026) & (USD Million)

Table 141. Aerometrex Recent Developments/Updates

Table 142. Aerometrex Competitive Strengths & Weaknesses

Table 143. China International Geomatics Co., Ltd. Basic Information, Manufacturing Base and Competitors

Table 144. China International Geomatics Co., Ltd. Major Business

Table 145. China International Geomatics Co., Ltd. Aerial Surveying & Mapping Services Product and Services

Table 146. China International Geomatics Co., Ltd. Aerial Surveying & Mapping Services Revenue, Gross Margin and Market Share (2021-2026) & (USD Million)

Table 147. China International Geomatics Co., Ltd. Recent Developments/Updates

Table 148. China International Geomatics Co., Ltd. Competitive Strengths & Weaknesses

Table 149. Kenn Borek Air Basic Information, Manufacturing Base and Competitors

Table 150. Kenn Borek Air Major Business

Table 151. Kenn Borek Air Aerial Surveying & Mapping Services Product and Services

Table 152. Kenn Borek Air Aerial Surveying & Mapping Services Revenue, Gross Margin and Market Share (2021-2026) & (USD Million)

Table 153. Kenn Borek Air Recent Developments/Updates

Table 154. Kenn Borek Air Competitive Strengths & Weaknesses

Table 155. Getmapping Basic Information, Manufacturing Base and Competitors

Table 156. Getmapping Major Business

Table 157. Getmapping Aerial Surveying & Mapping Services Product and Services

Table 158. Getmapping Aerial Surveying & Mapping Services Revenue, Gross Margin and Market Share (2021-2026) & (USD Million)

Table 159. Getmapping Recent Developments/Updates

Table 160. Getmapping Competitive Strengths & Weaknesses

Table 161. Feiyan Aerial Remote Sensing Technology Co., Ltd. Basic Information, Manufacturing Base and Competitors

Table 162. Feiyan Aerial Remote Sensing Technology Co., Ltd. Major Business

Table 163. Feiyan Aerial Remote Sensing Technology Co., Ltd. Aerial Surveying &

Mapping Services Product and Services

Table 164. Feiyan Aerial Remote Sensing Technology Co., Ltd. Aerial Surveying & Mapping Services Revenue, Gross Margin and Market Share (2021-2026) & (USD Million)

Table 165. Feiyan Aerial Remote Sensing Technology Co., Ltd. Recent Developments/Updates

Table 166. Feiyan Aerial Remote Sensing Technology Co., Ltd. Competitive Strengths & Weaknesses

Table 167. BSF Swissphoto Basic Information, Manufacturing Base and Competitors

Table 168. BSF Swissphoto Major Business

Table 169. BSF Swissphoto Aerial Surveying & Mapping Services Product and Services

Table 170. BSF Swissphoto Aerial Surveying & Mapping Services Revenue, Gross Margin and Market Share (2021-2026) & (USD Million)

Table 171. BSF Swissphoto Recent Developments/Updates

Table 172. BSF Swissphoto Competitive Strengths & Weaknesses

Table 173. Landpoint Basic Information, Manufacturing Base and Competitors

Table 174. Landpoint Major Business

Table 175. Landpoint Aerial Surveying & Mapping Services Product and Services

Table 176. Landpoint Aerial Surveying & Mapping Services Revenue, Gross Margin and Market Share (2021-2026) & (USD Million)

Table 177. Landpoint Recent Developments/Updates

Table 178. Landpoint Competitive Strengths & Weaknesses

Table 179. Sichuan Zhongshui Chengkan Institute Surveying and Mapping Engineering Co., Ltd. Basic Information, Manufacturing Base and Competitors

Table 180. Sichuan Zhongshui Chengkan Institute Surveying and Mapping Engineering Co., Ltd. Major Business

Table 181. Sichuan Zhongshui Chengkan Institute Surveying and Mapping Engineering Co., Ltd. Aerial Surveying & Mapping Services Product and Services

Table 182. Sichuan Zhongshui Chengkan Institute Surveying and Mapping Engineering Co., Ltd. Aerial Surveying & Mapping Services Revenue, Gross Margin and Market Share (2021-2026) & (USD Million)

Table 183. Sichuan Zhongshui Chengkan Institute Surveying and Mapping Engineering Co., Ltd. Recent Developments/Updates

Table 184. Sichuan Zhongshui Chengkan Institute Surveying and Mapping Engineering Co., Ltd. Competitive Strengths & Weaknesses

Table 185. Beijing Zhongkan Maipu Technology Co., Ltd. Basic Information, Manufacturing Base and Competitors

Table 186. Beijing Zhongkan Maipu Technology Co., Ltd. Major Business

Table 187. Beijing Zhongkan Maipu Technology Co., Ltd. Aerial Surveying & Mapping

Services Product and Services

Table 188. Beijing Zhongkan Maipu Technology Co., Ltd. Aerial Surveying & Mapping Services Revenue, Gross Margin and Market Share (2021-2026) & (USD Million)

Table 189. Beijing Zhongkan Maipu Technology Co., Ltd. Recent Developments/Updates

Table 190. Beijing Zhongkan Maipu Technology Co., Ltd. Competitive Strengths & Weaknesses

Table 191. Guangzhou Lantu Geographic Information Technology Co., Ltd. Basic Information, Manufacturing Base and Competitors

Table 192. Guangzhou Lantu Geographic Information Technology Co., Ltd. Major Business

Table 193. Guangzhou Lantu Geographic Information Technology Co., Ltd. Aerial Surveying & Mapping Services Product and Services

Table 194. Guangzhou Lantu Geographic Information Technology Co., Ltd. Aerial Surveying & Mapping Services Revenue, Gross Margin and Market Share (2021-2026) & (USD Million)

Table 195. Guangzhou Lantu Geographic Information Technology Co., Ltd. Recent Developments/Updates

Table 196. Guangzhou Lantu Geographic Information Technology Co., Ltd. Competitive Strengths & Weaknesses

Table 197. Beijing Jiexiang Tiandi Information Technology Co., Ltd. Basic Information, Manufacturing Base and Competitors

Table 198. Beijing Jiexiang Tiandi Information Technology Co., Ltd. Major Business

Table 199. Beijing Jiexiang Tiandi Information Technology Co., Ltd. Aerial Surveying & Mapping Services Product and Services

Table 200. Beijing Jiexiang Tiandi Information Technology Co., Ltd. Aerial Surveying & Mapping Services Revenue, Gross Margin and Market Share (2021-2026) & (USD Million)

Table 201. Beijing Jiexiang Tiandi Information Technology Co., Ltd. Recent Developments/Updates

Table 202. Beijing Jiexiang Tiandi Information Technology Co., Ltd. Competitive Strengths & Weaknesses

Table 203. Goodland Surveys Basic Information, Manufacturing Base and Competitors

Table 204. Goodland Surveys Major Business

Table 205. Goodland Surveys Aerial Surveying & Mapping Services Product and Services

Table 206. Goodland Surveys Aerial Surveying & Mapping Services Revenue, Gross Margin and Market Share (2021-2026) & (USD Million)

Table 207. Goodland Surveys Recent Developments/Updates

Table 208. Goodland Surveys Competitive Strengths & Weaknesses
Table 209. Arya Geospatial Basic Information, Manufacturing Base and Competitors
Table 210. Arya Geospatial Major Business
Table 211. Arya Geospatial Aerial Surveying & Mapping Services Product and Services
Table 212. Arya Geospatial Aerial Surveying & Mapping Services Revenue, Gross Margin and Market Share (2021-2026) & (USD Million)
Table 213. Arya Geospatial Recent Developments/Updates
Table 214. Arya Geospatial Competitive Strengths & Weaknesses
Table 215. VMAPS Technologies Basic Information, Manufacturing Base and Competitors
Table 216. VMAPS Technologies Major Business
Table 217. VMAPS Technologies Aerial Surveying & Mapping Services Product and Services
Table 218. VMAPS Technologies Aerial Surveying & Mapping Services Revenue, Gross Margin and Market Share (2021-2026) & (USD Million)
Table 219. VMAPS Technologies Recent Developments/Updates
Table 220. VMAPS Technologies Competitive Strengths & Weaknesses
Table 221. AB Surveying and Development Basic Information, Manufacturing Base and Competitors
Table 222. AB Surveying and Development Major Business
Table 223. AB Surveying and Development Aerial Surveying & Mapping Services Product and Services
Table 224. AB Surveying and Development Aerial Surveying & Mapping Services Revenue, Gross Margin and Market Share (2021-2026) & (USD Million)
Table 225. AB Surveying and Development Recent Developments/Updates
Table 226. AB Surveying and Development Competitive Strengths & Weaknesses
Table 227. EMC, Inc. Basic Information, Manufacturing Base and Competitors
Table 228. EMC, Inc. Major Business
Table 229. EMC, Inc. Aerial Surveying & Mapping Services Product and Services
Table 230. EMC, Inc. Aerial Surveying & Mapping Services Revenue, Gross Margin and Market Share (2021-2026) & (USD Million)
Table 231. EMC, Inc. Recent Developments/Updates
Table 232. EMC, Inc. Competitive Strengths & Weaknesses
Table 233. ARC Aerial Imaging Basic Information, Manufacturing Base and Competitors
Table 234. ARC Aerial Imaging Major Business
Table 235. ARC Aerial Imaging Aerial Surveying & Mapping Services Product and Services
Table 236. ARC Aerial Imaging Aerial Surveying & Mapping Services Revenue, Gross Margin and Market Share (2021-2026) & (USD Million)

Table 237. ARC Aerial Imaging Recent Developments/Updates

Table 238. ARC Aerial Imaging Competitive Strengths & Weaknesses

Table 239. Global Key Players of Aerial Surveying & Mapping Services Upstream (Raw Materials)

Table 240. Global Aerial Surveying & Mapping Services Typical Customers

List Of Figures

LIST OF FIGURES

- Figure 1. Aerial Surveying & Mapping Services Picture
- Figure 2. World Aerial Surveying & Mapping Services Total Revenue: 2021 & 2025 & 2032, (USD Million)
- Figure 3. World Aerial Surveying & Mapping Services Total Revenue (2021-2032) & (USD Million)
- Figure 4. World Aerial Surveying & Mapping Services Revenue by Region (2021, 2025 and 2032) & (USD Million), (by Headquarter Location)
- Figure 5. World Aerial Surveying & Mapping Services Revenue Market Share by Region (2021-2032), (by Headquarter Location)
- Figure 6. United States Based Company Aerial Surveying & Mapping Services Revenue (2021-2032) & (USD Million)
- Figure 7. China Based Company Aerial Surveying & Mapping Services Revenue (2021-2032) & (USD Million)
- Figure 8. Europe Based Company Aerial Surveying & Mapping Services Revenue (2021-2032) & (USD Million)
- Figure 9. Japan Based Company Aerial Surveying & Mapping Services Revenue (2021-2032) & (USD Million)
- Figure 10. South Korea Based Company Aerial Surveying & Mapping Services Revenue (2021-2032) & (USD Million)
- Figure 11. ASEAN Based Company Aerial Surveying & Mapping Services Revenue (2021-2032) & (USD Million)
- Figure 12. India Based Company Aerial Surveying & Mapping Services Revenue (2021-2032) & (USD Million)
- Figure 13. Aerial Surveying & Mapping Services Market Drivers
- Figure 14. Factors Affecting Demand
- Figure 15. World Aerial Surveying & Mapping Services Consumption Value (2021-2032) & (USD Million)
- Figure 16. World Aerial Surveying & Mapping Services Consumption Value Market Share by Region (2021-2032)
- Figure 17. United States Aerial Surveying & Mapping Services Consumption Value (2021-2032) & (USD Million)
- Figure 18. China Aerial Surveying & Mapping Services Consumption Value (2021-2032) & (USD Million)
- Figure 19. Europe Aerial Surveying & Mapping Services Consumption Value (2021-2032) & (USD Million)

Figure 20. Japan Aerial Surveying & Mapping Services Consumption Value (2021-2032) & (USD Million)

Figure 21. South Korea Aerial Surveying & Mapping Services Consumption Value (2021-2032) & (USD Million)

Figure 22. ASEAN Aerial Surveying & Mapping Services Consumption Value (2021-2032) & (USD Million)

Figure 23. India Aerial Surveying & Mapping Services Consumption Value (2021-2032) & (USD Million)

Figure 24. Producer Shipments of Aerial Surveying & Mapping Services by Player Revenue (\$MM) and Market Share (%): 2025

Figure 25. Global Four-firm Concentration Ratios (CR4) for Aerial Surveying & Mapping Services Markets in 2025

Figure 26. Global Four-firm Concentration Ratios (CR8) for Aerial Surveying & Mapping Services Markets in 2025

Figure 27. United States VS China: Aerial Surveying & Mapping Services Revenue Market Share Comparison (2021 & 2025 & 2032)

Figure 28. United States VS China: Aerial Surveying & Mapping Services Consumption Value Market Share Comparison (2021 & 2025 & 2032)

Figure 29. World Aerial Surveying & Mapping Services Market Size by Type, (USD Million), 2021 & 2025 & 2032

Figure 30. World Aerial Surveying & Mapping Services Market Size Market Share by Type in 2025

Figure 31. Fixed-Wing Aircraft Surveying Services

Figure 32. Helicopter Surveying Services

Figure 33. Unmanned Aerial Vehicle (UAV) Surveying Services

Figure 34. Multi-Platform Integrated Surveying Services

Figure 35. World Aerial Surveying & Mapping Services Market Size Market Share by Type (2021-2032)

Figure 36. World Aerial Surveying & Mapping Services Market Size by Supply Source and Product Condition, (USD Million), 2021 & 2025 & 2032

Figure 37. World Aerial Surveying & Mapping Services Market Size Market Share by Supply Source and Product Condition in 2025

Figure 38. Aerial Surveying Services

Figure 39. Aerial Mapping Services

Figure 40. Integrated Surveying and Mapping Services

Figure 41. Data Processing and Geospatial Analysis Services

Figure 42. World Aerial Surveying & Mapping Services Market Size Market Share by Supply Source and Product Condition (2021-2032)

Figure 43. World Aerial Surveying & Mapping Services Market Size by Survey Area per

Project, (USD Million), 2021 & 2025 & 2032

Figure 44. World Aerial Surveying & Mapping Services Market Size Market Share by Survey Area per Project in 2025

Figure 45. Small-Scale Projects: ≤ 50 km²

Figure 46. Medium-Scale Projects: 50–500 km²

Figure 47. Large-Scale Projects: 500–5,000 km²

Figure 48. Ultra-Large Projects: $> 5,000$ km²

Figure 49. World Aerial Surveying & Mapping Services Market Size Market Share by Survey Area per Project (2021-2032)

Figure 50. World Aerial Surveying & Mapping Services Market Size by Application, (USD Million), 2021 & 2025 & 2032

Figure 51. World Aerial Surveying & Mapping Services Market Size Market Share by Application in 2025

Figure 52. Land Surveying

Figure 53. Urban Planning

Figure 54. Transportation Infrastructure

Figure 55. Energy and Utilities

Figure 56. Agriculture and Forestry

Figure 57. Others

Figure 58. World Aerial Surveying & Mapping Services Market Size Market Share by Application (2021-2032)

Figure 59. Aerial Surveying & Mapping Services Industrial Chain

Figure 60. Methodology

Figure 61. Research Process and Data Source

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