

Small Drone Market by Platform (Civil & Commercial and Defense & Government), Type (Fixed Wing, Rotary Wing, and Hybrid), Application, Mode of Operation, Power Source (Fully Powered, Battery Powered) & Region – Global Forecast to 2027

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Abstracts

The small drone market is projected to grow from USD 3.8 billion in 2022 to USD 6.2 Billion by 2027, at a CAGR of 10.1% from 2022 to 2027. Rising procurement of small drone for military applications like ISR to drive the small drone market growth during the forecast period.

Small drones have been increasingly used by defense forces in various countries to carry out military operations, such as Intelligence, Surveillance & Reconnaissance (ISR) activities and battle damage management. The success of any air, naval, or military operation hugely depends on ISR capabilities. Thus, there are regular developments and advancements happening in the ISR field. For instance, the Fifth Generation C4ISR is a joint battle management system that can gather data, understand it, and communicate freely with all its components. C4ISR powered by AI uses machine learning to identify and classify tanks and other vehicles, improves the image feeds, and also provides driving assistance by giving early warning on obstacles and changing ground conditions. Hence, governments are also quickly adopting these technologies to improve their defense arsenal. Some common examples of small military drones are RQ-11, RQ-20 Puma, and RQ-21 Blackjack, among others. The use of small drones in military operations not only save lives but also enable operations to continue for a longer period due to the high endurance of small drones. Moreover, increasing use of small drones in life-threatening military missions is the primary factor fueling the demand for small drones in military applications. Small drones are used in military missions that can be life-threatening for pilots. These missions, generally referred to as

three-D's (Dull, Dirty, and Dangerous), may result in putting the lives of pilots at risk. These types of missions are best carried out using small drones that can be operated remotely or autonomously. Improvements in range and altitude capabilities of small drones have enhanced their reliability, enabling them to carry out military operations with the same precision as manned aircraft but with considerably lower risk. In addition, the rising use of small drones by defense forces as loitering munition is the second factor that fuels the procurement of small drones. There are certain remotely piloted small drones designed to operate as loitering munition for defense forces.

Based on type, the rotary wing segment is projected to grow at highest CAGR during the forecast period.

Based on type, the market has been classified into fixed wing, rotary wing, and hybrid. The fixed-wing segment has been further divided into conventional take-off and landing (CTOL) and vertical take-off and landing (VTOL), while the rotary-wing segment has been classified into single rotor and multirotor. Among these, the rotary wing segment is projected to grow at highest CAGR during the forecast period. Rotary-wing drones, due to their VTOL capability, can function in a broader range of environments than fixed-wing drones, as they eliminate the requirement of any additional setup or space to facilitate their take-off and landing. Moreover, the ability of these drones to hover over places makes them ideal for filmmaking, surveillance, and imaging applications. Rotary-wing drones are of two types, namely, single rotor or multirotor. The multirotor drones are further classified into bi-copters, tri-copters, quadcopters, hexacopters, and octocopters.

Generally, small multicopter drones use batteries as power sources. This increases their adoption in industrial and recreational activities. DJI (China), AeroVironment (US), and Israel Aerospace Industries (Israel) are prominent players developing multirotor small drones.

Based on mode of operation, fully autonomous segment witness strong growth in market during the forecast period

Based on mode of operation, the small drone market has been classified into fully autonomous, remotely piloted, and optionally piloted. The fully autonomous segment is projected to grow at a significant rate during the forecast period. The growth of this segment can be attributed to the cost-effective usage of autonomous small drones in several applications, ranging from defense operations to surveys. Autonomous small drones are programmable robots that can perform tasks at high altitudes with high-

power capacity. These drones can operate in inaccessible areas and provide high-quality results and data as they are equipped with technologically advanced systems. Currently, the market for autonomous drones is smaller than the market for optionally piloted drones. Autonomous drones are widely used in various military applications. The US is the largest market for these drones; the growth of the market in this country can be attributed to the increased spending of the US Army on the R&D of drones. Autonomous drones are programmed to launch ammunition and attack targets without receiving data signals from the operator. The Kargu-2 Quadcopter drone developed by STM (Turkey) is an autonomous drone capable of carrying out an autonomous attack. According to the United Nations (UN), a fully autonomous drone, such as STM Kargu-2 or a drone of some classified nature, was used in a military conflict in Libya in 2020. The autonomous drone, labeled as lethal autonomous weapon system (LAWS), uses machine learning and real-time image processing. As per the UN, the LAWS is programmed to launch warheads without requiring data connectivity from the operator and has “fire, forget, and find” capability, which implies the munition can guide itself to the target independently.

The Asia Pacific regions are projected to be high growth potential markets for the small drone during the forecast period.

The small drone market in the Asia Pacific region is anticipated to witness strong growth during the forecast period.

The retail and e-commerce sectors are dominant in Asia Pacific, followed by the healthcare and pharmaceutical sector. China and Japan are key markets for drones used in commercial applications.

The prevailing trends of automation in India, Australia, and China and the ongoing globalization are also fueling the growth of the small drone market in Asia Pacific. Small drones are being increasingly used in the real estate, pollution monitoring, and agriculture sectors to carry out inspections in China and Japan.

The break-up of the profiles of primary participants in the small drone market is as follows:

By Company Type: Tier 1–32%; Tier 2–40%; and Tier 3–28%

By Designation: C Level Executives–35%; Directors–25%; and Others–40%

By Region: North America–39.19%; Europe–21.06%; Asia Pacific–28.25%; Middle East–10%; Latin America–6.0%; and Africa–6.9%

Major players in the small drone market are DJI (China), Parrot Drone SAS (France), Israel Aerospace Industry Ltd. (Israel), AeroVironment, Inc. (US), and Lockheed Martin Corporation (US). These companies have strong distribution networks in the logistics business across North America, Europe, Asia Pacific and other regions in turn driving the demand for last mile deliveries and drone package deliveries.

Research Coverage

This research report categorizes the small drone market based on platform the market is divided into civil & commercial and defense & government. On the basis of application, the market is fragmented into military, commercial, government & law, and consumer. By type, the market is classified into fixed, wing, rotary wing, and hybrid. Based on mode of operation the small drone market is divided into remotely piloted, optionally piloted, and fully autonomous. The market is segmented into Fuel Powered and Battery Powered based on power source. The small drone market has been studied for North America, Europe, Asia Pacific, Middle East, Latin America, and Africa.

The scope of the report covers detailed information regarding the major factors, such as drivers, restraints, challenges, and opportunities, influencing the growth of the small drone market. A detailed analysis of the key industry players has been done to provide insights into their business overviews; solutions and services; key strategies; contracts, joint ventures, partnerships & agreements, acquisitions, and new product launches associated with the small drone market. Competitive analysis of upcoming startups in the small drone market ecosystem is covered in this report.

Reasons to Buy this Report

This report is expected to help market leaders/new entrants with information on the closest approximations of the revenue numbers for the overall small drone market and its segments. This study is also expected to provide region wise information about the end-use industrial sectors, wherein small drone is used. This report aims at helping the stakeholders understand the competitive landscape of the market, gain insights to improve the position of their businesses, and plan suitable go-to-market strategies. This report is also expected to help them understand the pulse of the market and provide them with information on key drivers, restraints, challenges, and opportunities

influencing the growth of the market.

The report provides insights on the following pointers:

Market Penetration: Comprehensive information on small drone offered by the top players in the market

Product Development/Innovation: Detailed insights on upcoming technologies, research & development activities, and new product launches in the small drone market

Market Development: Comprehensive information about lucrative markets – the report analyzes the small drone market across varied regions

Market Diversification: Exhaustive information about new products, untapped geographies, recent developments, and investments in the small drone market

Competitive Assessment: In-depth assessment of market shares, growth strategies, products, and manufacturing capabilities of leading players in the small drone market

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