

Small Drones 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 2030

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Abstracts

The small drones market is projected to grow from USD 5.8 billion in 2023 to USD 10.4 Billion by 2030, at a CAGR of 8.6% from 2023 to 2030. Rising procurement of small drones for commercial and military applications like product delivery, inspection and monitoring, ISR to drive the small drone market growth during the forecast period.

Currently, Small drones are being extensively used in various commercial applications, such as photography, 3D mapping, product and medicine delivery, data transmission, and inspection & monitoring in confined spaces. They are also used in agriculture, real estate, and oil & gas industries. In the agriculture industry, the use of small drones has led to the evolution of precision farming, which has enabled farmers to monitor the health of crops, keep track of irrigation equipment, and identify different types of weeds, among others. Modern drones use the Normalized Difference Vegetation Index (NDVI), a remote sensing technique that assesses the health and density of vegetation. Drones compare the reflected intensities of visible and near-infrared (NIR) light to provide high-resolution photographs of crops. By employing this reflected light in the visible and near-infrared bands, the NDVI index can identify and measure the presence of living, green vegetation.

On the other hand, the military application segment witnessed significant growth during the forecast period. The defense forces in various nations have increasingly turned to small drones for conducting military operations, including Intelligence, Surveillance & Reconnaissance (ISR) tasks and the management of battle damage. The effectiveness

of air, naval, and military operations greatly hinges on their ISR capabilities, leading to ongoing developments and advancements in this field. An example of such innovation is the Fifth Generation C4ISR, a joint battle management system capable of collecting, analyzing, and communicating data seamlessly across its components. This C4ISR system, powered by artificial intelligence (AI), utilizes machine learning to identify and categorize tanks and other vehicles, enhance image feeds, and provide early warnings about obstacles and changing ground conditions. Consequently, governments are swiftly adopting these technologies to bolster their defense capabilities.

Additionally, the growing adoption of small drones by defense forces for use as loitering munition represents another significant factor driving the procurement of these devices. Some remotely piloted small drones are specifically designed to function as loitering munition for defense purposes.

“Based on rotary wing type, the multirotor segment to grow at highest CAGR during forecast period.”

The market has been categorized into different types, including fixed wing, rotary wing, and hybrid. Within the fixed wing category, there are two subcategories: conventional take-off and landing (CTOL) and vertical take-off and landing (VTOL). Meanwhile, the rotary wing segment can be further divided into single rotors and multirotors. Among these, the multirotor segment is expected to experience the highest Compound Annual Growth Rate (CAGR) during the forecast period.

Rotary-wing drones, due to their VTOL capability, possess a more extensive range of operational environments compared to fixed-wing drones. They do not require additional setup or space for take-off and landing, making them versatile for various applications, such as filmmaking, surveillance, and imaging. Within the category of rotary-wing drones, there are two main types: single rotor and multirotor. Multirotor drones can be classified into several subtypes, including bi-copters, tri-copters, quadcopters, hexacopters, and octocopters.

Typically, small multi-copter drones rely on batteries as their power source, which contributes to their popularity in both industrial and recreational activities. Prominent players in the development of multirotor small drones include DJI (China), AeroVironment (US), and Israel Aerospace Industries (Israel).

“Based on mode of operation, fully autonomous segment witness strong growth in

market during the forecast period.”

The small drone market is segmented based on its mode of operation, including fully autonomous, remotely piloted, and optionally piloted categories. Among these, the fully autonomous segment is expected to experience significant growth during the forecast period. This growth can be attributed to the cost-effective utility of autonomous small drones in a wide range of applications, spanning from defense operations to surveys.

Autonomous small drones are essentially programmable robots capable of performing tasks at high altitudes with ample power capacity. These drones excel in operating within inaccessible areas and delivering high-quality results and data, thanks to their advanced technological systems. Presently, the market for autonomous drones is smaller than that of optionally piloted drones. Autonomous drones find extensive use in various military applications, with the United States being the largest market for these drones. The growth in the US market can be attributed to increased investment by the US Army in drone research and development.

Autonomous drones are programmed to launch ammunition and execute attacks independently, without the need for continuous data signals from an operator. An example of such a drone is the Kargu-2 Quadcopter developed by STM (Turkey), which possesses autonomous attack capabilities. According to the United Nations (UN), fully autonomous drones like the STM Kargu-2, or similar classified drones, were employed in a military conflict in Libya in 2020. These autonomous drones are categorized as lethal autonomous weapon systems (LAWS), utilizing machine learning and real-time image processing. According to the UN, LAWS are programmed to launch warheads autonomously and possess a "fire, forget, and find" capability, allowing munitions to guide themselves to targets independently.

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

Over the course of the forecast period, the Asia Pacific small drone market is expected to rise rapidly. Many nations are concentrating on strengthening their defensive capacities due to the uncertain geopolitical environment in the Asia-Pacific region. In the upcoming years, the Asia Pacific small drone market is anticipated to grow at a rapid pace due to the prevalent tendency of emerging economies like China, Malaysia, and India purchasing drones. The world's adoption of drone technologies has grown exponentially after 2020. Throughout the projected period, the growing need for drone services and solutions from the military, commercial, government, and law enforcement

is expected to drive the small drone market's expansion.

In Asia Pacific, the retail and e-commerce industries lead, followed by the pharmaceutical and healthcare industries. China and Japan represent significant markets for commercial drone applications.

The continued globalization and the automation trends that are prevalent in China, India, and Australia are also driving growth in the small drone market in Asia Pacific. In China and Japan, small drones are being utilized more and more for inspections in the real estate, agriculture, and pollution monitoring sectors.

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

By Company Type: Tier 1–49%; Tier 2–37%; and Tier 3–14%

By Designation: C Level Executives–55%; Directors–27%; and Others–18%

By Region: North America–32%; Europe–32%; Asia Pacific–16%; Latin America–7%; Middle East–10%; and Africa–3%

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 classifies the small drone market into various segments based on several criteria. These segments include:

Platform: The market is categorized into civil & commercial and defense & government sectors.

Application: Segments within this category include military, commercial, government & law, and consumer applications.

Type: The market is further divided into fixed wing, rotary wing, and hybrid types of drones.

Mode of Operation: The small drone market is segmented into remotely piloted, optionally piloted, and fully autonomous categories based on how the drones are operated.

Power Source: Drones in the market are grouped into Fuel Powered and Battery Powered categories based on their sources of power.

Geographic Regions: The report analyzes the small drone market across different regions, including North America, Europe, Asia Pacific, the Middle East, Latin America, and Africa.

The report's scope encompasses comprehensive details regarding key factors influencing the growth of the small drone market, including drivers, restraints, challenges, and opportunities. Additionally, the report conducts a thorough analysis of major industry players, providing insights into their business profiles, offered solutions and services, key strategies, as well as their involvement in contracts, joint ventures, partnerships, agreements, acquisitions, and new product launches related to the small drone market. Furthermore, the report includes a competitive analysis of emerging startups within the small drone market ecosystem.

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

Market Growth: Supportive government regulations and initiatives to drive the market growth in near future

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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