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Autonomous Aircraft Market – Global Industry Size, Share, Trends, Opportunity, and Forecast, Segmented By Aircraft Type (Fixed-Wing UAVs, Multi-Rotor Aerial Vehicles, Rotary Blade Type UAV), By Technology (Increasingly Autonomous (IA) and Fully Autonomous), By Region, Competition, 2019-2029F

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Abstracts

The Global Autonomous Aircraft Market size reached USD 7.51 Billion in 2023 and is expected t%li%grow with a CAGR of 6.94% through 2029. The global autonomous aircraft market is experiencing a paradigm shift in aviation, marked by advancements in artificial intelligence, automation, and aerospace technology. Autonomous aircraft, als%li%known as unmanned aerial vehicles (UAVs) or drones, have expanded beyond traditional military applications t%li%become integral components of various sectors, including commercial, surveillance, and carg%li%transportation.

In the commercial sector, the autonomous aircraft market is witnessing a surge in interest from companies exploring the feasibility of autonomous air taxis and urban air mobility solutions. This includes the development of electric vertical takeoff and landing (eVTOL) aircraft designed for short-distance passenger transport, offering the potential t%li%revolutionize urban transportation.

Surveillance and reconnaissance applications continue t%li%drive demand in the defense and security sectors. Autonomous aircraft equipped with advanced sensors and imaging technologies provide real-time data for military operations, border surveillance, and disaster response. These capabilities enhance situational awareness and operational efficiency while minimizing human risk in high-risk environments.

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In carg%li%transportation, companies are exploring autonomous aircraft for last-mile delivery solutions. The concept of using drones for package delivery has gained traction, with major e-commerce and logistics companies conducting pilot programs t%li%assess the viability and efficiency of autonomous aerial delivery systems.

Technological innovations in autonomous aircraft include advancements in artificial intelligence for autonomous navigation, collision avoidance systems, and sensor technologies for accurate data collection. The market's growth is further fueled by ongoing research and development efforts t%li%enhance the safety, reliability, and efficiency of autonomous flight operations.

However, challenges persist, including regulatory frameworks, public acceptance, and the development of infrastructure t%li%support widespread autonomous aircraft operations. The collaboration between aviation authorities, industry stakeholders, and technology developers is crucial t%li%address these challenges and pave the way for the broader integration of autonomous aircraft int%li%global airspace.

Key Market Drivers

Technological Advancements in Artificial Intelligence (AI) and Autonomy

The rapid progress in AI and autonomy is a primary driver of the global autonomous aircraft market. Advances in machine learning algorithms and sensor technologies enable autonomous aircraft t%li%make real-time decisions, navigate complex environments, and execute missions with precision. This technological prowess is foundational for the development of unmanned aerial vehicles (UAVs) with increased autonomy across various sectors.

Commercialization of Urban Air Mobility (UAM)

The emergence of Urban Air Mobility represents a significant driver, with companies exploring autonomous aircraft for short-distance passenger transport in urban environments. The concept of electric vertical takeoff and landing (eVTOL) aircraft and air taxis is gaining traction, driven by the potential t%li%alleviate traffic congestion and provide efficient transportation solutions in densely populated areas.

Growth in Carg%li%and Package Delivery Applications

The demand for efficient and rapid carg%li%transportation has fueled interest in

autonomous aircraft for last-mile delivery. Major logistics and e-commerce companies are investing in drone technology t%li%streamline package delivery services. Autonomous aircraft offer the advantage of quick and direct routes, making them attractive for time-sensitive deliveries and reducing dependence on traditional ground-based transportation.

Enhanced Surveillance and Reconnaissance Capabilities

The defense and security sectors are driving the adoption of autonomous aircraft for surveillance and reconnaissance purposes. UAVs equipped with advanced sensors, cameras, and communication systems provide real-time data for military operations, border patrol, and disaster response. The ability t%li%deploy unmanned aircraft in hazardous or remote areas enhances situational awareness and mission effectiveness.

Environmental Sustainability and Electric Propulsion

The emphasis on environmental sustainability is influencing the autonomous aircraft market, leading t%li%the development of electric propulsion systems. Electric UAVs, including eVTOLs, contribute t%li%reduced carbon emissions and noise pollution, aligning with global efforts t%li%make aviation more eco-friendly. The focus on green technologies is driving innovation and shaping the market's direction.

Increased Cost-Efficiency in Operations

Autonomous aircraft offer the potential for increased cost-efficiency in various applications. Reduced manpower requirements, operational flexibility, and the ability t%li%access challenging or remote locations contribute t%li%cost savings for businesses and organizations utilizing autonomous aerial vehicles. This economic advantage is a key driver for the widespread adoption of autonomous aircraft across industries.

Advancements in Sensor Technologies

Continuous advancements in sensor technologies, including LiDAR, radar, and imaging systems, play a crucial role in enhancing the capabilities of autonomous aircraft. High-precision sensors enable accurate navigation, obstacle detection, and data collection, contributing t%li%the overall safety and efficiency of autonomous flight operations. These advancements open up new possibilities for diverse applications in sectors such as agriculture, infrastructure inspection, and environmental monitoring.

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Collaborative Research and Development Initiatives

Collaborative efforts between industry players, research institutions, and government agencies contribute significantly t%li%the growth of the autonomous aircraft market. Joint research and development initiatives foster innovation, address technical challenges, and promote the standardization of technologies and regulations. Such collaborations create a conducive environment for advancing the capabilities and applications of autonomous aircraft on a global scale.

Key Market Challenges

Regulatory Hurdles and Airspace Integration

One of the foremost challenges facing the global autonomous aircraft market is the development and implementation of regulatory frameworks that ensure safe and standardized operations. Integrating autonomous aircraft int%li%existing airspace systems requires close collaboration between aviation authorities and industry stakeholders. Overcoming regulatory hurdles and establishing clear guidelines for autonomous flight is crucial for the widespread acceptance and deployment of autonomous aircraft.

Public Perception and Acceptance:

Public perception and acceptance of autonomous aircraft pose significant challenges. Concerns related t%li%safety, privacy, and the unfamiliarity of autonomous technology can lead t%li%resistance from communities and individuals. Building trust through transparent communication, addressing safety protocols, and ensuring adherence t%li%privacy regulations are essential for overcoming public skepticism and fostering acceptance of autonomous aircraft.

Technological Limitations and Reliability

Despite rapid advancements, technological limitations such as battery life, sensor accuracy, and communication reliability remain challenges in the autonomous aircraft market. Ensuring the reliability of autonomous systems, especially in complex and dynamic environments, is crucial for safety and operational success. Continued research and development efforts are needed t%li%overcome these technological constraints and enhance the overall performance of autonomous aircraft.

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Security Concerns and Cyber Threats

The increased reliance on autonomous systems in aviation introduces new challenges related t%li%cybersecurity. Autonomous aircraft, like any connected technology, are susceptible t%li%cyber threats that could compromise their navigation systems, communication links, or data integrity. Developing robust cybersecurity measures and protocols t%li%safeguard autonomous aircraft from malicious attacks is imperative t%li%ensure the security and resilience of the aviation ecosystem.

Limited Infrastructure for Autonomous Operations

The infrastructure required t%li%support widespread autonomous aircraft operations is currently limited. This includes the need for dedicated landing pads, charging stations for electric UAVs, and communication networks optimized for autonomous flight. The lack of infrastructure poses challenges for the seamless integration of autonomous aircraft int%li%various industries, particularly in urban environments where infrastructure development is essential.

Autonomous Traffic Management Systems

Designing effective autonomous traffic management systems is a significant challenge in the autonomous aircraft market. Developing systems that can handle the coordination, communication, and navigation of multiple autonomous aircraft in a shared airspace requires sophisticated technologies and standardized protocols. Creating a robust traffic management infrastructure is essential for preventing collisions and ensuring the efficient use of airspace.

High Development and Implementation Costs

The initial investment required for the development and implementation of autonomous aircraft technologies can be substantial. High research and development costs, coupled with expenses associated with ensuring safety and regulatory compliance, may pose financial challenges for companies entering the autonomous aircraft market. Achieving cost-effectiveness and demonstrating a favorable return on investment are essential for the sustainable growth of the industry.

Education and Training for Operators

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The successful integration of autonomous aircraft requires a skilled workforce capable of operating and maintaining these advanced technologies. Challenges related t%li%education and training programs for operators, pilots, and maintenance personnel need t%li%be addressed. Providing comprehensive training on autonomous systems, navigation algorithms, and emergency procedures is essential for ensuring the competent and safe operation of autonomous aircraft in various sectors.

Key Market Trends

Urban Air Mobility (UAM) Revolution

The global autonomous aircraft market is experiencing a transformative trend with the rise of Urban Air Mobility (UAM). Companies are actively developing electric vertical takeoff and landing (eVTOL) aircraft, showcasing the potential for air taxis and on-demand aerial transportation services in urban environments. The UAM trend reflects a paradigm shift in how people and goods are transported, emphasizing the integration of autonomous technology int%li%daily urban life.

Eco-Friendly Propulsion Systems

A prominent trend in the autonomous aircraft market is the emphasis on eco-friendly propulsion systems. Electric and hybrid-electric propulsion technologies are gaining traction, driven by the aviation industry's commitment t%li%sustainability. Autonomous electric UAVs not only reduce carbon emissions but als%li%address concerns related t%li%noise pollution, making them environmentally friendly alternatives for various applications, including urban air mobility and carg%li%delivery.

Advanced Artificial Intelligence (AI) and Machine Learning Integration

The integration of advanced artificial intelligence (AI) and machine learning algorithms is a key trend shaping the capabilities of autonomous aircraft. AI plays a crucial role in enhancing autonomous navigation, obstacle detection, and decision-making processes. Machine learning enables autonomous systems t%li%learn and adapt based on real-world experiences, contributing t%li%improved performance, safety, and efficiency in various operational scenarios.

Increased Autonomy and Full Autopilot Capabilities

The trend toward increased autonomy and full autopilot capabilities is reshaping the

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autonomous aircraft landscape. Advancements in autonomy enable UAVs t%li%execute complex missions with minimal human intervention, ranging from surveillance and inspections t%li%carg%li%deliveries. Full autopilot systems equipped with advanced sensors and algorithms empower autonomous aircraft t%li%navigate challenging environments and perform tasks more efficiently, opening up new possibilities for diverse applications.

Hybrid Operations and Manned-Unmanned Teaming

The trend of hybrid operations involves the integration of autonomous aircraft alongside traditional manned aviation, fostering synergies known as manned-unmanned teaming (MUM-T). This approach leverages the strengths of both autonomous and human-operated aircraft, enabling collaborative and coordinated missions. MUM-T is particularly relevant in defense and surveillance applications, where a combination of autonomous and manned platforms enhances mission effectiveness.

Focus on Counter-Drone Technologies

As the deployment of autonomous aircraft increases, the market is witnessing a concurrent focus on counter-drone technologies. With concerns about unauthorized drone activities and potential security threats, the development of effective counter-drone systems is becoming crucial. The trend involves the creation of technologies t%li%detect, identify, and mitigate the risks posed by unauthorized or malicious drones, ensuring the safe and secure integration of autonomous aircraft int%li%airspace.

Blockchain for Flight Data Security

The use of blockchain technology for ensuring the security and integrity of flight data is an emerging trend in the autonomous aircraft market. Blockchain provides a decentralized and tamper-proof system for storing and managing data, addressing concerns related t%li%data security and privacy. This trend is particularly relevant in applications where the accuracy and integrity of flight data, such as surveillance and mapping, are paramount.

Collaborative Industry Initiatives and Standards

Collaborative industry initiatives and the development of standards are trends aimed at fostering a cohesive and interoperable autonomous aircraft ecosystem. Stakeholders across the aviation industry are working together t%li%establish common protocols,

safety standards, and regulatory frameworks. These initiatives support the responsible and sustainable growth of the autonomous aircraft market, ensuring consistency and compatibility in technology, operations, and regulatory compliance.

Segmental Insights

By Aircraft Type

The Global Autonomous Aircraft Market is witnessing significant growth and innovation driven by advancements in technology, increasing demand for unmanned aerial vehicles (UAVs), and a wide range of applications across various industries. The market is segmented based on aircraft type outlook int%li%Fixed-Wing UAVs, Multi-Rotor Aerial Vehicles, and Rotary Blade Type UAVs, each offering unique capabilities and functionalities.

Fixed-Wing UAVs represent a dominant segment within the Global Autonomous Aircraft Market. These unmanned aircraft are characterized by their fixed-wing design, resembling traditional manned aircraft, and are capable of sustained, long-endurance flights over large distances. Fixed-wing UAVs are widely used in military, commercial, and civil applications, including surveillance, reconnaissance, mapping, surveying, and carg%li%transportation. They offer advantages such as high speed, long-range capabilities, and efficient fuel consumption compared t%li%other types of UAVs, making them ideal for applications requiring extended flight durations and large area coverage. In military applications, fixed-wing UAVs are utilized for intelligence, surveillance, and reconnaissance (ISR) missions, providing real-time situational awareness and target acquisition capabilities t%li%military forces. In the commercial sector, fixed-wing UAVs are used for aerial photography, agricultural monitoring, infrastructure inspection, and environmental monitoring, enabling cost-effective and efficient data collection across diverse industries. With advancements in autonomy, artificial intelligence, and sensor technologies, fixed-wing UAVs are becoming increasingly autonomous and capable of autonomous takeoff, landing, and mission execution, further expanding their capabilities and applications in the Global Autonomous Aircraft Market.

Multi-Rotor Aerial Vehicles represent faster growing segment within the Global Autonomous Aircraft Market. These UAVs are characterized by their multi-rotor design, typically featuring four or more rotors arranged in a quadcopter, hexacopter, or octocopter configuration. Multi-rotor aerial vehicles offer advantages such as vertical takeoff and landing (VTOL) capabilities, hover stability, and maneuverability, making them well-suited for close-range inspection, surveillance, and aerial photography

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applications. They are widely used in urban environments, confined spaces, and indoor areas where traditional fixed-wing UAVs may have limited maneuverability or operational constraints. In commercial applications, multi-rotor aerial vehicles are employed for aerial cinematography, real estate photography, infrastructure inspection, and emergency response, providing high-resolution imagery and vide%li%footage for various purposes. Additionally, multi-rotor UAVs are popular among hobbyists and recreational users for aerial photography, racing, and entertainment, driving demand for consumer-grade UAVs in the Global Autonomous Aircraft Market. With advancements in lightweight materials, battery technology, and flight control systems, multi-rotor aerial vehicles are becoming more agile, efficient, and autonomous, enabling a wide range of applications and opportunities in the growing UAV market.

Rotary Blade Type UAVs represent a specialized segment within the Global Autonomous Aircraft Market, characterized by their rotary-wing design and unique capabilities for vertical takeoff and landing (VTOL). These UAVs include rotorcraft such as helicopters, tiltrotors, and drones equipped with rotary-wing configurations, offering versatility, maneuverability, and operational flexibility for various mission requirements. Rotary blade type UAVs are utilized in military, commercial, and civil applications, including search and rescue, emergency medical services (EMS), law enforcement, and aerial firefighting. In military applications, rotary-wing UAVs are employed for troop transport, aerial reconnaissance, and special operations, providing vertical lift capabilities and access t%li%remote or inaccessible areas. In the commercial sector, rotary blade type UAVs are used for aerial surveillance, pipeline inspection, powerline maintenance, and environmental monitoring, offering a cost-effective and efficient alternative t%li%manned helicopters and fixed-wing aircraft. With advancements in rotorcraft technology, autonomous flight control systems, and sense-and-avoid capabilities, rotary blade type UAVs are becoming increasingly autonomous and capable of performing complex missions in dynamic and challenging environments, driving growth and innovation in the Global Autonomous Aircraft Market.

Regional Insights

North America stands as a dominating and influential region in the global autonomous aircraft market. The United States, in particular, is a major hub for technological innovation and industry leadership. The region is witnessing significant developments in urban air mobility (UAM) initiatives, with companies exploring autonomous air taxis and electric vertical takeoff and landing (eVTOL) aircraft for urban transportation. Collaborations between regulatory bodies like the Federal Aviation Administration (FAA) and industry stakeholders are crucial in shaping the regulatory landscape. North

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America's robust aerospace ecosystem, coupled with ongoing research and development activities, positions it at the forefront of autonomous aircraft advancements.

Europe & CIS is characterized by a commitment t%li%sustainability and advancements in aviation technology. The European Union Aviation Safety Agency (EASA) plays a pivotal role in establishing regulatory frameworks for autonomous flight. The region is witnessing notable developments in electric propulsion systems and autonomous air mobility solutions. European countries are actively engaged in research collaborations and public-private partnerships t%li%drive innovation in autonomous aircraft technologies. The emphasis on environmental considerations aligns with the development of eco-friendly autonomous propulsion systems.

The Asia-Pacific region is experiencing rapid growth in the autonomous aircraft market, driven by technological advancements and a burgeoning interest in unmanned systems. Countries like China, Japan, and South Korea are actively investing in research and development, contributing t%li%the expansion of the market. China, in particular, is a significant player, with companies exploring applications in areas such as e-commerce drone delivery. The diverse landscape of the Asia-Pacific region provides opportunities for various applications, including surveillance, agriculture, and infrastructure inspection. Regulatory developments are underway t%li%facilitate the integration of autonomous aircraft int%li%the airspace.

The Middle East and Africa are emerging as regions with increasing potential for the autonomous aircraft market. The unique geographical challenges, coupled with the region's focus on technological advancements, drive interest in unmanned aerial systems for applications such as surveillance and security. Countries like the United Arab Emirates (UAE) are actively exploring the use of autonomous aircraft for diverse purposes, reflecting a growing awareness of the technology's capabilities. The Middle East's strategic importance and investment in futuristic technologies contribute t%li%the region's significance in the global autonomous aircraft landscape.

Key Market Players

Airbus SE

BAE Systems plc

The Boeing Company

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Elbit Systems Ltd.

AeroVironment, Inc.

Embraer S.A.

Lockheed Martin Corporation

Northrop Grumman Corporation

Report Scope:

In this report, the Global Autonomous Aircraft Market has been segmented int%li%the following categories, in addition t%li%the industry trends which have als%li%been detailed below:

Autonomous Aircraft Market, By Aircraft Type:

Fixed-Wing UAVs

Multi-Rotor Aerial Vehicles

Rotary Blade Type UAV

Autonomous Aircraft Market, By Technology:

Increasingly Autonomous (IA)

Fully Autonomous

Autonomous Aircraft Market, By Region:

North America

United States

Canada

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Mexico

Europe & CIS

Germany

Spain

France

Russia

Italy

United Kingdom

Belgium

Asia-Pacific

China

India

Japan

Indonesia

Thailand

Australia

South Korea

South America

Brazil

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Argentina

Colombia

Middle East & Africa

Turkey

Iran

Saudi Arabia

UAE

Competitive Landscape

Company Profiles: Detailed analysis of the major companies presents in the Global Autonomous Aircraft Market.

Available Customizations:

Global Autonomous Aircraft Market report with the given market data, TechSci Research offers customizations according t%li%a company's specific needs. The following customization options are available for the report:

Company Information

Detailed analysis and profiling of additional market players (up t%li%five).

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Contents

1. INTRODUCTION

1.1. Product Overview
1.2. Key Highlights of the Report
1.3. Market Coverage
1.4. Market Segments Covered
1.5. Research Tenure Considered

2. RESEARCH METHODOLOGY

2.1. Objective of the Study
2.2. Baseline Methodology
2.3. Key Industry Partners
2.4. Major Association and Secondary Sources
2.5. Forecasting Methodology
2.6. Data Triangulation & Validation
2.7. Assumptions and Limitations

3. EXECUTIVE SUMMARY

3.1. Market Overview
3.2. Market Forecast
3.3. Key Regions
3.4. Key Segments

4. IMPACT OF COVID-19 ON GLOBAL AUTONOMOUS AIRCRAFT MARKET

5. GLOBAL AUTONOMOUS AIRCRAFT MARKET OUTLOOK

5.1. Market Size & Forecast
  5.1.1. By Value
5.2. Market Share & Forecast
  5.2.1. By Aircraft Type Market Share Analysis (Fixed-Wing UAVs, Multi-Rotor Aerial Vehicles, Rotary Blade Type UAV)
  5.2.2. By Technology Market Share Analysis (Increasingly Autonomous (IA) and Fully Autonomous)
  5.2.3. By Regional Market Share Analysis

+44 20 8123 2220
info@marketpublishers.com

5.2.3.1. Asia-Pacific Market Share Analysis
5.2.3.2. Europe & CIS Market Share Analysis
5.2.3.3. North America Market Share Analysis
5.2.3.4. South America Market Share Analysis
5.2.3.5. Middle East & Africa Market Share Analysis
5.2.4. By Company Market Share Analysis (Top 5 Companies, Others - By Value, 2023)
5.3. Global Autonomous Aircraft Market Mapping & Opportunity Assessment
5.3.1. By Aircraft Type Market Mapping & Opportunity Assessment
5.3.2. By Technology Market Mapping & Opportunity Assessment
5.3.3. By Regional Market Mapping & Opportunity Assessment

6. ASIA-PACIFIC AUTONOMOUS AIRCRAFT MARKET OUTLOOK

6.1. Market Size & Forecast
6.1.1. By Value
6.2. Market Share & Forecast
6.2.1. By Aircraft Type Market Share Analysis
6.2.2. By Technology Market Share Analysis
6.2.3. By Country Market Share Analysis
6.2.3.1. China Market Share Analysis
6.2.3.2. India Market Share Analysis
6.2.3.3. Japan Market Share Analysis
6.2.3.4. Indonesia Market Share Analysis
6.2.3.5. Thailand Market Share Analysis
6.2.3.6. South Korea Market Share Analysis
6.2.3.7. Australia Market Share Analysis
6.2.3.8. Rest of Asia-Pacific Market Share Analysis
6.3. Asia-Pacific: Country Analysis
6.3.1. China Autonomous Aircraft Market Outlook
6.3.1.1. Market Size & Forecast
6.3.1.1.1. By Value
6.3.1.2. Market Share & Forecast
6.3.1.2.1. By Aircraft Type Market Share Analysis
6.3.1.2.2. By Technology Market Share Analysis
6.3.2. India Autonomous Aircraft Market Outlook
6.3.2.1. Market Size & Forecast
6.3.2.1.1. By Value
6.3.2.2. Market Share & Forecast

+44 20 8123 2220
info@marketpublishers.com

6.3.2.2.1. By Aircraft Type Market Share Analysis
6.3.2.2.2. By Technology Market Share Analysis
6.3.3. Japan Autonomous Aircraft Market Outlook
6.3.3.1. Market Size & Forecast
6.3.3.1.1. By Value
6.3.3.2. Market Share & Forecast
6.3.3.2.1. By Aircraft Type Market Share Analysis
6.3.3.2.2. By Technology Market Share Analysis
6.3.4. Indonesia Autonomous Aircraft Market Outlook
6.3.4.1. Market Size & Forecast
6.3.4.1.1. By Value
6.3.4.2. Market Share & Forecast
6.3.4.2.1. By Aircraft Type Market Share Analysis
6.3.4.2.2. By Technology Market Share Analysis
6.3.5. Thailand Autonomous Aircraft Market Outlook
6.3.5.1. Market Size & Forecast
6.3.5.1.1. By Value
6.3.5.2. Market Share & Forecast
6.3.5.2.1. By Aircraft Type Market Share Analysis
6.3.5.2.2. By Technology Market Share Analysis
6.3.6. South Korea Autonomous Aircraft Market Outlook
6.3.6.1. Market Size & Forecast
6.3.6.1.1. By Value
6.3.6.2. Market Share & Forecast
6.3.6.2.1. By Aircraft Type Market Share Analysis
6.3.6.2.2. By Technology Market Share Analysis
6.3.7. Australia Autonomous Aircraft Market Outlook
6.3.7.1. Market Size & Forecast
6.3.7.1.1. By Value
6.3.7.2. Market Share & Forecast
6.3.7.2.1. By Aircraft Type Market Share Analysis
6.3.7.2.2. By Technology Market Share Analysis

7. EUROPE & CIS AUTONOMOUS AIRCRAFT MARKET OUTLOOK

7.1. Market Size & Forecast
7.1.1. By Value
7.2. Market Share & Forecast
7.2.1. By Aircraft Type Market Share Analysis

+44 20 8123 2220
info@marketpublishers.com

7.2.2. By Technology Market Share Analysis
7.2.3. By Country Market Share Analysis
7.2.3.1. Germany Market Share Analysis
7.2.3.2. Spain Market Share Analysis
7.2.3.3. France Market Share Analysis
7.2.3.4. Russia Market Share Analysis
7.2.3.5. Italy Market Share Analysis
7.2.3.6. United Kingdom Market Share Analysis
7.2.3.7. Belgium Market Share Analysis
7.2.3.8. Rest of Europe & CIS Market Share Analysis
7.3. Europe & CIS: Country Analysis
7.3.1. Germany Autonomous Aircraft Market Outlook
7.3.1.1. Market Size & Forecast
7.3.1.1.1. By Value
7.3.1.2. Market Share & Forecast
7.3.1.2.1. By Aircraft Type Market Share Analysis
7.3.1.2.2. By Technology Market Share Analysis
7.3.2. Spain Autonomous Aircraft Market Outlook
7.3.2.1. Market Size & Forecast
7.3.2.1.1. By Value
7.3.2.2. Market Share & Forecast
7.3.2.2.1. By Aircraft Type Market Share Analysis
7.3.2.2.2. By Technology Market Share Analysis
7.3.3. France Autonomous Aircraft Market Outlook
7.3.3.1. Market Size & Forecast
7.3.3.1.1. By Value
7.3.3.2. Market Share & Forecast
7.3.3.2.1. By Aircraft Type Market Share Analysis
7.3.3.2.2. By Technology Market Share Analysis
7.3.4. Russia Autonomous Aircraft Market Outlook
7.3.4.1. Market Size & Forecast
7.3.4.1.1. By Value
7.3.4.2. Market Share & Forecast
7.3.4.2.1. By Aircraft Type Market Share Analysis
7.3.4.2.2. By Technology Market Share Analysis
7.3.5. Italy Autonomous Aircraft Market Outlook
7.3.5.1. Market Size & Forecast
7.3.5.1.1. By Value
7.3.5.2. Market Share & Forecast

+44 20 8123 2220
info@marketpublishers.com

7.3.5.2.1. By Aircraft Type Market Share Analysis
7.3.5.2.2. By Technology Market Share Analysis
7.3.6. United Kingdom Autonomous Aircraft Market Outlook
7.3.6.1. Market Size & Forecast
7.3.6.1.1. By Value
7.3.6.2. Market Share & Forecast
7.3.6.2.1. By Aircraft Type Market Share Analysis
7.3.6.2.2. By Technology Market Share Analysis
7.3.7. Belgium Autonomous Aircraft Market Outlook
7.3.7.1. Market Size & Forecast
7.3.7.1.1. By Value
7.3.7.2. Market Share & Forecast
7.3.7.2.1. By Aircraft Type Market Share Analysis
7.3.7.2.2. By Technology Market Share Analysis

8. NORTH AMERICA AUTONOMOUS AIRCRAFT MARKET OUTLOOK

8.1. Market Size & Forecast
8.1.1. By Value
8.2. Market Share & Forecast
8.2.1. By Aircraft Type Market Share Analysis
8.2.2. By Technology Market Share Analysis
8.2.3. By Country Market Share Analysis
8.2.3.1. United States Market Share Analysis
8.2.3.2. Mexico Market Share Analysis
8.2.3.3. Canada Market Share Analysis
8.3. North America: Country Analysis
8.3.1. United States Autonomous Aircraft Market Outlook
8.3.1.1. Market Size & Forecast
8.3.1.1.1. By Value
8.3.1.2. Market Share & Forecast
8.3.1.2.1. By Aircraft Type Market Share Analysis
8.3.1.2.2. By Technology Market Share Analysis
8.3.2. Mexico Autonomous Aircraft Market Outlook
8.3.2.1. Market Size & Forecast
8.3.2.1.1. By Value
8.3.2.2. Market Share & Forecast
8.3.2.2.1. By Aircraft Type Market Share Analysis
8.3.2.2.2. By Technology Market Share Analysis

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info@marketpublishers.com

8.3.3. Canada Autonomous Aircraft Market Outlook
8.3.3.1. Market Size & Forecast
8.3.3.1.1. By Value
8.3.3.2. Market Share & Forecast
8.3.3.2.1. By Aircraft Type Market Share Analysis
8.3.3.2.2. By Technology Market Share Analysis

9. SOUTH AMERICA AUTONOMOUS AIRCRAFT MARKET OUTLOOK

9.1. Market Size & Forecast
9.1.1. By Value
9.2. Market Share & Forecast
9.2.1. By Aircraft Type Market Share Analysis
9.2.2. By Technology Market Share Analysis
9.2.3. By Country Market Share Analysis
9.2.3.1. Brazil Market Share Analysis
9.2.3.2. Argentina Market Share Analysis
9.2.3.3. Colombia Market Share Analysis
9.2.3.4. Rest of South America Market Share Analysis
9.3. South America: Country Analysis
9.3.1. Brazil Autonomous Aircraft Market Outlook
9.3.1.1. Market Size & Forecast
9.3.1.1.1. By Value
9.3.1.2. Market Share & Forecast
9.3.1.2.1. By Aircraft Type Market Share Analysis
9.3.1.2.2. By Technology Market Share Analysis
9.3.2. Colombia Autonomous Aircraft Market Outlook
9.3.2.1. Market Size & Forecast
9.3.2.1.1. By Value
9.3.2.2. Market Share & Forecast
9.3.2.2.1. By Aircraft Type Market Share Analysis
9.3.2.2.2. By Technology Market Share Analysis
9.3.3. Argentina Autonomous Aircraft Market Outlook
9.3.3.1. Market Size & Forecast
9.3.3.1.1. By Value
9.3.3.2. Market Share & Forecast
9.3.3.2.1. By Aircraft Type Market Share Analysis
9.3.3.2.2. By Technology Market Share Analysis

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10. MIDDLE EAST & AFRICA AUTONOMOUS AIRCRAFT MARKET OUTLOOK

10.1. Market Size & Forecast
10.1.1. By Value
10.2. Market Share & Forecast
10.2.1. By Aircraft Type Market Share Analysis
10.2.2. By Technology Market Share Analysis
10.2.3. By Country Market Share Analysis
10.2.3.1. Turkey Market Share Analysis
10.2.3.2. Iran Market Share Analysis
10.2.3.3. Saudi Arabia Market Share Analysis
10.2.3.4. UAE Market Share Analysis
10.2.3.5. Rest of Middle East & Africa Market Share Analysis
10.3. Middle East & Africa: Country Analysis
10.3.1. Turkey Autonomous Aircraft Market Outlook
10.3.1.1. Market Size & Forecast
10.3.1.1.1. By Value
10.3.1.2. Market Share & Forecast
10.3.1.2.1. By Aircraft Type Market Share Analysis
10.3.1.2.2. By Technology Market Share Analysis
10.3.2. Iran Autonomous Aircraft Market Outlook
10.3.2.1. Market Size & Forecast
10.3.2.1.1. By Value
10.3.2.2. Market Share & Forecast
10.3.2.2.1. By Aircraft Type Market Share Analysis
10.3.2.2.2. By Technology Market Share Analysis
10.3.3. Saudi Arabia Autonomous Aircraft Market Outlook
10.3.3.1. Market Size & Forecast
10.3.3.1.1. By Value
10.3.3.2. Market Share & Forecast
10.3.3.2.1. By Aircraft Type Market Share Analysis
10.3.3.2.2. By Technology Market Share Analysis
10.3.4. UAE Autonomous Aircraft Market Outlook
10.3.4.1. Market Size & Forecast
10.3.4.1.1. By Value
10.3.4.2. Market Share & Forecast
10.3.4.2.1. By Aircraft Type Market Share Analysis
10.3.4.2.2. By Technology Market Share Analysis

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11. SWOT ANALYSIS

11.1. Strength
11.2. Weakness
11.3. Opportunities
11.4. Threats

12. MARKET DYNAMICS

12.1. Market Drivers
12.2. Market Challenges

13. MARKET TRENDS AND DEVELOPMENTS

14. COMPETITIVE LANDSCAPE

14.1. Company Profiles (Up to 10 Major Companies)
  14.1.1. Airbus SE
    14.1.1.1. Company Details
    14.1.1.2. Key Product Offered
    14.1.1.3. Financials (As Per Availability)
    14.1.1.4. Recent Developments
    14.1.1.5. Key Management Personnel
  14.1.2. BAE Systems plc
    14.1.2.1. Company Details
    14.1.2.2. Key Product Offered
    14.1.2.3. Financials (As Per Availability)
    14.1.2.4. Recent Developments
    14.1.2.5. Key Management Personnel
  14.1.3. The Boeing Company
    14.1.3.1. Company Details
    14.1.3.2. Key Product Offered
    14.1.3.3. Financials (As Per Availability)
    14.1.3.4. Recent Developments
    14.1.3.5. Key Management Personnel
  14.1.4. Elbit Systems Ltd.
    14.1.4.1. Company Details
    14.1.4.2. Key Product Offered
    14.1.4.3. Financials (As Per Availability)

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14.1.4.4. Recent Developments
14.1.4.5. Key Management Personnel
14.1.5. AeroVironment, Inc.
14.1.5.1. Company Details
14.1.5.2. Key Product Offered
14.1.5.3. Financials (As Per Availability)
14.1.5.4. Recent Developments
14.1.5.5. Key Management Personnel
14.1.6. Embraer S.A.
14.1.6.1. Company Details
14.1.6.2. Key Product Offered
14.1.6.3. Financials (As Per Availability)
14.1.6.4. Recent Developments
14.1.6.5. Key Management Personnel
14.1.7. Lockheed Martin Corporation
14.1.7.1. Company Details
14.1.7.2. Key Product Offered
14.1.7.3. Financials (As Per Availability)
14.1.7.4. Recent Developments
14.1.7.5. Key Management Personnel
14.1.8. Northrop Grumman Corporation
14.1.8.1. Company Details
14.1.8.2. Key Product Offered
14.1.8.3. Financials (As Per Availability)
14.1.8.4. Recent Developments
14.1.8.5. Key Management Personnel

15. STRATEGIC RECOMMENDATIONS

15.1. Key Focus Areas
15.1.1. Target Regions
15.1.2. Target Aircraft Type
15.1.3. Target Technology

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