

Electric Drone Market – Global Industry Size, Share, Trends, Opportunity, and Forecast, Segmented By Technology Type (Battery, Solar, Fuel-Cell), By Type (Fixed-Wing, Rotary, Hybrid), By Application (Commercial, Military), By Region, Competition, 2019-2029

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Abstracts

Global Electric Drone Market was valued at USD 23.3 billion in 2023 and is anticipated to project robust growth in the forecast period with a CAGR of 6.09% through 2029. The global electric drone market is experiencing rapid growth driven by advancements in technology, increasing applications across various sectors, and the growing demand for unmanned aerial vehicles (UAVs). Electric drones, powered by rechargeable batteries or fuel cells, offer advantages such as lower operating costs, reduced emissions, and longer flight times compared to traditional fuel-powered drones. The companies are investing heavily in research and development to enhance drone performance, extend flight range, and improve battery efficiency. The market for electric drones spans diverse sectors including agriculture, construction, energy, infrastructure inspection, surveillance, and logistics. In agriculture, drones equipped with sensors and cameras are used for crop monitoring, precision agriculture, and spraying pesticides. In construction and infrastructure, drones provide aerial surveying, mapping, and site monitoring services. Additionally, electric drones play a vital role in disaster management, search and rescue operations, environmental monitoring, and aerial photography and videography. As regulations evolve to accommodate the integration of drones into airspace, and as technological advancements continue to improve drone capabilities, the global electric drone market is expected to witness sustained growth in the coming years, revolutionizing industries and transforming the way we perceive aerial mobility and data acquisition.

Key Market Drivers

Advancements in Battery Technology and Electric Propulsion Systems

One of the primary drivers propelling the global electric drone market is the continuous advancement in battery technology and electric propulsion systems. As drones become increasingly sophisticated and versatile, the need for powerful and efficient propulsion systems is paramount. Electric propulsion, driven by lithium-polymer (LiPo) and lithium-ion (Li-ion) batteries, has revolutionized the drone industry. These batteries provide high energy density, longer flight times, and quicker recharging capabilities, making them ideal for drones used in various applications. The improvement of battery technology is two-fold, with a focus on both energy storage and safety. Lithium-based batteries have become safer, with enhanced thermal management and protective features to prevent overheating and fire hazards. Moreover, research into alternative battery chemistries, such as solid-state batteries and lithium-sulfur batteries, holds the promise of further enhancing the efficiency and safety of electric drones. These advancements are particularly vital for the commercial and industrial sectors, where electric drones are used for tasks like aerial photography, agriculture, surveillance, and infrastructure inspection. Longer flight times allow drones to cover more ground and capture more data in a single mission, improving operational efficiency and reducing downtime for recharging. Electric propulsion systems also offer environmental benefits, as they produce lower emissions compared to traditional combustion engines, aligning with the global push for sustainability.

Expanding Applications in Agriculture and Precision Farming

The global electric drone market is driven by the expanding applications of drones in agriculture and precision farming. The agricultural sector has seen a remarkable transformation with the integration of drones for tasks such as crop monitoring, pest control, and crop spraying. Electric drones equipped with high-resolution cameras and multispectral sensors provide valuable data on crop health, soil conditions, and irrigation needs, aiding farmers in making informed decisions and optimizing their yields. Precision agriculture, often referred to as smart farming, leverages data collected by drones to enhance productivity while minimizing resource usage. Drones equipped with thermal imaging cameras can detect variations in temperature across a field, identifying areas with potential irrigation or drainage issues. This enables targeted interventions, reducing water wastage and optimizing crop health. In addition to monitoring and data collection, electric drones have also been deployed for aerial application in agriculture.

Electric drone sprayers are increasingly replacing traditional ground-based equipment for pesticide and fertilizer distribution. They offer precise and controlled applications, reducing chemical usage, minimizing human exposure to hazardous substances, and limiting soil compaction from heavy machinery. The growth of electric drones in agriculture is also influenced by government initiatives and regulations supporting the use of unmanned aerial vehicles (UAVs) in farming practices. Many countries have introduced regulations that promote drone use in agriculture, recognizing the benefits of these technologies in improving crop yields, reducing environmental impact, and ensuring food security.

Rapid Expansion in the E-commerce and Last-Mile Delivery Sector

The electric drone market is witnessing rapid expansion due to the surging demand for e-commerce and last-mile delivery services. With the growth of online shopping and the need for efficient delivery options, electric drones have emerged as a viable solution for last-mile deliveries in urban and rural areas. Companies in the e-commerce sector are investing in drone technology to offer faster and more cost-effective delivery services. Electric drones can bypass traffic congestion and deliver packages to remote or hard-to-reach locations, improving delivery times and customer satisfaction. While regulatory hurdles remain, innovative technologies like vertical take-off and landing (VTOL) drones are addressing issues related to urban airspace restrictions and landing sites. Electric drones in delivery services are not limited to parcels; they are also being used for medical supply transport, food delivery, and emergency response. In remote or disaster-stricken areas, electric drones play a critical role in delivering life-saving supplies and aid, showcasing their potential in addressing urgent humanitarian needs. The electric drone market's growth in e-commerce and delivery applications is also supported by ongoing research and development efforts to improve battery life and payload capacity. These improvements are crucial for ensuring that electric drones can handle a wide range of delivery requirements, from small packages to medical equipment.

Advancements in Artificial Intelligence (AI) and Autonomous Navigation

Another significant driver for the global electric drone market is the integration of artificial intelligence (AI) and autonomous navigation systems. AI-powered drones are capable of real-time data analysis, enabling autonomous decision-making and adapting to changing environments. This is particularly important in applications such as search and rescue, surveillance, and monitoring, where drones need to make split-second decisions to assess situations and provide valuable information to operators. AI also plays a critical role in data processing and analysis. Electric drones are equipped with

various sensors and cameras that capture vast amounts of data during flight. AI algorithms process this data, extracting relevant information and providing actionable insights. For instance, in environmental monitoring, drones equipped with AI can analyze data to detect forest fires, pollution levels, or illegal logging activities. Autonomous navigation is another key area of development. Electric drones are becoming increasingly adept at navigating complex environments, avoiding obstacles, and adjusting their flight path as needed. This capability is essential for applications like surveying, infrastructure inspection, and mapping. Autonomous drones can follow predefined flight plans, ensuring precise and consistent data collection while reducing the burden on operators. The growth of AI and autonomous navigation in electric drones also has implications for urban air mobility (UAM) and air taxis. As these technologies continue to mature, electric vertical take-off and landing (eVTOL) aircraft are expected to revolutionize urban transportation, offering efficient and sustainable options for short-haul travel within cities. AI-driven safety features and autonomous systems are fundamental for ensuring the reliability and safety of these aerial vehicles.

Rising Use of Electric Drones in Surveillance and Security

The use of electric drones in surveillance and security applications is a driving force behind the global electric drone market. Law enforcement agencies, border control, and private security firms are increasingly relying on electric drones to monitor and protect critical infrastructure, borders, public events, and private properties. Electric drones equipped with advanced imaging technologies, such as thermal and infrared cameras, are essential for surveillance in various lighting and environmental conditions. These drones can conduct aerial surveillance during the day or night, making them valuable tools for law enforcement agencies to monitor and respond to criminal activities or emergencies. Electric drones are also used for border patrol and surveillance of remote areas. Their ability to cover large expanses of territory quickly and efficiently makes them an invaluable asset in safeguarding national borders and identifying illegal border crossings. These drones can transmit real-time video feeds to central command centers, enabling rapid response to potential threats. In addition to surveillance, electric drones play a crucial role in search and rescue operations. Equipped with high-resolution cameras and thermal imaging capabilities, they can locate missing persons or provide situational awareness in disaster-stricken areas. This application extends to firefighting, where drones assist in identifying the spread of wildfires and the deployment of firefighting resources.

Key Market Challenges

Technological Limitations

One of the significant challenges facing the global electric drone market is the existence of technological limitations that affect various aspects of drone performance. These limitations include constraints in battery technology, communication range, payload capacity, and obstacle avoidance capabilities. The battery technology used in electric drones is one of the primary limiting factors. While lithium-polymer (LiPo) and lithium-ion (Li-ion) batteries are widely used due to their high energy density and lightweight properties, they have limitations in terms of energy storage capacity and flight duration. Drones powered by these batteries often have relatively short flight times, which can be a hindrance in applications requiring extended operational periods. The development of longer-lasting and more energy-dense batteries, such as solid-state batteries, is crucial to overcoming this limitation. Electric drones rely on wireless communication systems to transmit data to operators and receive commands. However, the range of communication systems can be restricted, limiting the operational radius of drones. This limitation is particularly challenging for applications that require drones to operate over long distances, such as rural agriculture or search and rescue missions. Advancements in communication technologies, including satellite communication and signal amplification, are necessary to extend the range of electric drones. Payload capacity is a critical limitation for electric drones, especially in applications that require the transportation of heavy sensors or cargo. Drones must balance the weight of additional equipment or payload against their flight capabilities. Advancements in lightweight materials, drone design, and propulsion systems are necessary to increase payload capacity and enable more versatile applications. Obstacle Avoidance and Autonomous Navigation: While significant progress has been made in developing obstacle avoidance and autonomous navigation systems for drones, there are still limitations in their effectiveness, particularly in complex and dynamic environments. These systems rely on sensors such as LiDAR and cameras to detect and avoid obstacles, but they may struggle in challenging conditions like low-light situations or adverse weather. Improvements in sensor technology and AI-driven algorithms are essential to enhance obstacle avoidance and autonomous navigation capabilities.

Regulatory Hurdles

The global electric drone market faces substantial challenges related to regulatory hurdles and evolving aviation regulations. Governments worldwide are grappling with the need to strike a balance between promoting innovation and ensuring safety, privacy, and security in the use of electric drones. Airspace Integration: One of the significant regulatory challenges is the safe integration of electric drones into existing airspace.

Traditional aviation regulations were not designed to accommodate the vast number of drones now operating in shared airspace. Regulators are working to develop frameworks that allow drones to operate safely alongside manned aircraft. The development of detect-and-avoid (DAA) technology is critical in this regard.

Licensing and Certification: Regulations around the licensing and certification of drone operators and manufacturers are diverse and continually evolving. Different countries have varying requirements for drone pilots, and international standards are still being developed. Streamlining and harmonizing these regulations to facilitate global drone operations is a significant challenge.

Privacy Concerns: Electric drones equipped with high-resolution cameras and sensors have raised concerns about privacy and data protection. Balancing the legitimate use of drones for surveillance, monitoring, and data collection with privacy rights is a challenge that regulators need to address. Stricter privacy regulations, coupled with secure data handling practices, are essential.

Security and Counter-Drone Measures: As the use of electric drones continues to grow, so does the concern about the potential misuse of these devices for malicious purposes. Mitigating security risks, such as drone incursions in sensitive areas or attacks using drones, requires the development of counter-drone technologies and regulatory measures to address these threats.

Remote Identification and Tracking: Regulatory authorities are working to establish systems for remote identification and tracking of drones to enhance accountability and traceability. While this is crucial for safety and security, it poses technological challenges in terms of standardization and implementation across various drone models and manufacturers.

Security Concerns

Security concerns related to the use of electric drones are significant challenges that affect their adoption across multiple sectors. These concerns include the potential for drone-related incidents, unauthorized access, data breaches, and the misuse of drone technology.

Incursions and Unauthorized Access: The increasing prevalence of drones has led to concerns about incursions in restricted airspace, particularly near airports and critical infrastructure. Unauthorized access to drones, whether intentional or accidental, poses significant security risks. Ensuring the effective detection and mitigation of rogue drones is essential to address these challenges.

Data Security and Privacy: Electric drones are often equipped with cameras and sensors capable of collecting sensitive data. Ensuring the secure storage, transmission, and handling of this data is vital to protect individuals' privacy and avoid data breaches. Regulatory and technological measures must be in place to safeguard data collected by drones.

Key Market Trends

Integration of Artificial Intelligence (AI) and Machine Learning (ML)

One of the most significant trends driving the global electric drone market is the integration of artificial intelligence (AI) and machine learning (ML) technologies. AI and ML capabilities are revolutionizing the capabilities of electric drones, enabling them to perform complex tasks with a higher degree of autonomy and intelligence. AI-powered drones can process data in real-time, making autonomous decisions based on the information they gather. For instance, drones equipped with AI can identify objects of interest during surveillance or monitoring missions, recognize patterns, and even follow predefined flight paths or adjust their course to avoid obstacles. AI enables drones to adapt to changing conditions, such as adjusting flight altitude in response to terrain or weather changes. In agriculture, AI-powered drones can analyze data from various sensors, including multispectral and thermal cameras, to provide valuable insights into crop health, pest infestations, and irrigation needs. The integration of AI and ML allows these drones to identify areas that require specific interventions, such as targeted pesticide application or irrigation adjustments, optimizing crop yields and reducing resource usage. The significance of AI in the electric drone market is not limited to data analysis but extends to the development of AI-driven safety features. Drones can employ AI algorithms to detect and avoid obstacles, ensuring safe flight and reducing the risk of collisions. These advancements in AI contribute to the growth of electric drones in a variety of sectors, including agriculture, surveillance, infrastructure inspection, and environmental monitoring.

Rapid Advancements in Battery Technology

Battery technology is a critical driver in the electric drone market, and rapid advancements in this field are having a significant impact on the capabilities and applications of electric drones. The development of high-performance and energy-dense batteries is essential for extending flight times and enabling more demanding drone missions. Lithium-polymer (LiPo) and lithium-ion (Li-ion) batteries have been the primary power sources for electric drones, offering high energy density, lightweight properties, and quick recharge times. However, research and development efforts are ongoing to enhance these batteries further. Advancements focus on improving energy storage capacity, reducing weight, and increasing the overall lifespan of the batteries. One notable trend in battery technology is the exploration of alternative battery chemistry. Solid-state batteries, for instance, have the potential to offer higher energy densities, increased safety, and longer lifecycles compared to traditional LiPo or Li-ion batteries. Such advancements are essential for electric drones used in applications with

extended flight times or that require specialized features like long-endurance missions. Another aspect of battery technology in the electric drone market is focused on improving safety. Manufacturers are incorporating thermal management systems, fail-safes, and protective features to reduce the risk of overheating and fire hazards. As safety and reliability are paramount in the drone industry, the ongoing research and development of batteries with enhanced safety features are crucial for sustaining market growth. Additionally, the growth of electric drones in the commercial and industrial sectors is driving demand for specialized battery solutions. Electric drones used in agriculture, surveying, and inspection may require longer flight times and the ability to carry heavier payloads. Advances in battery technology are enabling these drones to meet the increasing demands of various industries, contributing to the overall expansion of the electric drone market.

Emergence of Urban Air Mobility (UAM) and Air Taxis

The emergence of urban air mobility (UAM) and air taxis is a trend that has the potential to significantly impact the electric drone market. UAM envisions a future where electric vertical take-off and landing (eVTOL) aircraft, commonly referred to as air taxis, offer efficient and sustainable short-haul transportation within urban areas. Electric drones play a pivotal role in the development of UAM, as they serve as the foundation for eVTOL technology. These electric aircraft are expected to revolutionize urban transportation by providing on-demand, point-to-point aerial mobility. UAM systems aim to alleviate congestion, reduce travel times, and offer environmentally friendly alternatives for commuting within cities. The growth of UAM and air taxis is driven by the need for efficient, reliable, and sustainable transportation solutions in densely populated urban areas. Electric drones are considered an integral part of this vision, as they can navigate the complexities of urban airspace, take off and land vertically, and offer a practical means of short-haul transportation. Moreover, electric drones in UAM applications are expected to leverage AI-driven safety features and autonomous navigation systems to ensure the reliability and safety of these aerial vehicles. As urban air mobility systems continue to advance, the electric drone market will expand to accommodate the development, manufacturing, and operation of eVTOL aircraft and air taxis.

Growing Demand in the Agriculture and Precision Farming Sector

The growing demand for electric drones in the agriculture and precision farming sector is a significant trend that is reshaping the electric drone market. Drones have become essential tools for modern agriculture, offering farmers valuable data and insights to

optimize crop yields and resource management. Electric drones equipped with high-resolution cameras, multispectral sensors, and thermal imaging capabilities are used for various agricultural applications. They provide real-time data on crop health, soil conditions, and irrigation needs. By collecting and analyzing this data, farmers can make informed decisions and implement targeted interventions. Precision agriculture, also known as smart farming, leverages data collected by electric drones to enhance productivity while minimizing resource usage. Drones equipped with AI and ML algorithms can identify areas that require specific treatments, such as adjusting irrigation or applying pesticides. This targeted approach reduces water wastage, minimizes the use of chemicals, and ensures crop health, ultimately leading to higher yields and sustainability. The adoption of electric drones in agriculture is further supported by government initiatives and regulations that recognize the benefits of these technologies. Many countries have introduced regulations and incentives to promote drone use in farming practices, acknowledging their role in improving crop yields, reducing environmental impact, and ensuring food security.

Integration of Electric Drones in E-commerce and Last-Mile Delivery

The integration of electric drones in the e-commerce and last-mile delivery sector is a trend that is gaining momentum and reshaping the electric drone market. As e-commerce continues to grow and online shopping becomes more prevalent, the need for efficient and rapid delivery solutions is evident. Companies in the e-commerce sector are increasingly investing in electric drone technology to offer faster and cost-effective delivery services. Electric drones can bypass traffic congestion, deliver packages to remote or hard-to-reach locations, and improve delivery times and customer satisfaction. While regulatory hurdles remain, innovative technologies like vertical take-off and landing (VTOL) drones are addressing issues related to urban airspace restrictions and landing sites. Electric drones are not limited to delivering parcels; they are also being used for medical supply transport, food delivery, and emergency response. In remote or disaster-stricken areas, electric drones play a critical role in delivering life-saving supplies and aid, showcasing their potential in addressing urgent humanitarian needs.

Segmental Insights

Type Analysis

The electric drone market is witnessing substantial growth due to various applications across multiple industries, including surveillance, agriculture, logistics, and

entertainment. Fixed-wing drones are favored for their efficiency in long-distance operations, often used in geographic mapping and agriculture due to their ability to cover large areas. On the other hand, rotary drones dominate the market in photography, surveillance, and inspection tasks thanks to their maneuverability and hover-in-place capability. Hybrid drones, combining the benefits of both fixed-wing and rotary designs, are emerging as a versatile solution for complex tasks that require both endurance and precision. The push for innovation in battery technology and control systems continues to expand the capabilities of electric drones, potentially revolutionizing sectors such as delivery services and urban air mobility.

Regional Insights

North America is expected to lead the market. The extensive geographical boundaries of nations like the United States require the use of unmanned aerial vehicles (UAVs) in order to maintain constant surveillance in areas that patrol forces are unable to access. To meet the operational demands of the US border patrol troops, there has been a concurrent rise in demand for E-UAVs with improved endurance and lower operating costs. Moreover, the substantial use of tactical UAVs in defense and military applications has led to a rise in the purchase of small UAVs. Given that small UAS are fueled by an electric power system, the region's E-UAV market would be driven by the increased procurement rate.

Key Market Players

Aeronautics Ltd.

Airbus SE

AeroVironment Inc.

AgEagle Aerial Systems, Inc.

SZ DJI Technology Co., Ltd.

Elbit Systems Ltd.

FLIR Systems, Inc.

Lockheed Martin Corporation

Parrot Drones SAS

Raytheon Technologies Corporation

Report Scope:

In this report, the Global Electric Drone Market has been segmented into the following categories, in addition to the industry trends which have also been detailed below:

Electric Drone Market, By Technology Type:

Battery

Solar

Fuel-Cell

Electric Drone Market, By Type:

Fixed-Wing

Rotary

Hybrid

Electric Drone Market, By Application Type:

Commercial

Military

Electric Drone Market, By Region:

Asia-Pacific

China

India

Japan

Indonesia

Thailand

South Korea

Australia

Europe & CIS

Germany

Spain

France

Russia

Italy

United Kingdom

Belgium

North America

United States

Canada

Mexico

South America

Brazil

Argentina

Colombia

Middle East & Africa

South Africa

Turkey

Saudi Arabia

UAE

Competitive Landscape

Company Profiles: Detailed analysis of the major companies present in the Global Electric Drone Market.

Available Customizations:

Global Electric Drone market report with the given market data, TechSci Research offers customizations according to 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 to five).

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 ELECTRIC DRONE MARKET

5. GLOBAL ELECTRIC DRONE MARKET OUTLOOK

- 5.1. Market Size & Forecast
 - 5.1.1. By Value
- 5.2. Market Share & Forecast
 - 5.2.1. By Technology Type Market Share Analysis (Battery, Solar, Fuel-Cell)
 - 5.2.2. By Type Market Share Analysis (Fixed-Wing, Rotary, Hybrid)
 - 5.2.3. By Application Type Market Share Analysis (Commercial, Military)
 - 5.2.4. By Regional Market Share Analysis
 - 5.2.4.1. Asia-Pacific Market Share Analysis

- 5.2.4.2. Europe & CIS Market Share Analysis
- 5.2.4.3. North America Market Share Analysis
- 5.2.4.4. South America Market Share Analysis
- 5.2.4.5. Middle East & Africa Market Share Analysis
- 5.2.5. By Company Market Share Analysis (Top 5 Companies, Others - By Value, 2023)
- 5.3. Global Electric Drone Market Mapping & Opportunity Assessment
 - 5.3.1. By Technology Type Market Mapping & Opportunity Assessment
 - 5.3.2. By Type Market Mapping & Opportunity Assessment
 - 5.3.3. By Application Type Market Mapping & Opportunity Assessment
 - 5.3.4. By Regional Market Mapping & Opportunity Assessment

6. ASIA-PACIFIC ELECTRIC DRONE MARKET OUTLOOK

- 6.1. Market Size & Forecast
 - 6.1.1. By Value
- 6.2. Market Share & Forecast
 - 6.2.1. By Technology Type Market Share Analysis
 - 6.2.2. By Type Market Share Analysis
 - 6.2.3. By Application Type Market Share Analysis
 - 6.2.4. By Country Market Share Analysis
 - 6.2.4.1. China Market Share Analysis
 - 6.2.4.2. India Market Share Analysis
 - 6.2.4.3. Japan Market Share Analysis
 - 6.2.4.4. Indonesia Market Share Analysis
 - 6.2.4.5. Thailand Market Share Analysis
 - 6.2.4.6. South Korea Market Share Analysis
 - 6.2.4.7. Australia Market Share Analysis
 - 6.2.4.8. Rest of Asia-Pacific Market Share Analysis
- 6.3. Asia-Pacific: Country Analysis
 - 6.3.1. China Electric Drone 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 Technology Type Market Share Analysis
 - 6.3.1.2.2. By Type Market Share Analysis
 - 6.3.1.2.3. By Application Type Market Share Analysis
 - 6.3.2. India Electric Drone Market Outlook
 - 6.3.2.1. Market Size & Forecast

- 6.3.2.1.1. By Value
- 6.3.2.2. Market Share & Forecast
 - 6.3.2.2.1. By Technology Type Market Share Analysis
 - 6.3.2.2.2. By Type Market Share Analysis
 - 6.3.2.2.3. By Application Type Market Share Analysis
- 6.3.3. Japan Electric Drone 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 Technology Type Market Share Analysis
 - 6.3.3.2.2. By Type Market Share Analysis
 - 6.3.3.2.3. By Application Type Market Share Analysis
- 6.3.4. Indonesia Electric Drone 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 Technology Type Market Share Analysis
 - 6.3.4.2.2. By Type Market Share Analysis
 - 6.3.4.2.3. By Application Type Market Share Analysis
- 6.3.5. Thailand Electric Drone 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 Technology Type Market Share Analysis
 - 6.3.5.2.2. By Type Market Share Analysis
 - 6.3.5.2.3. By Application Type Market Share Analysis
- 6.3.6. South Korea Electric Drone 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 Technology Type Market Share Analysis
 - 6.3.6.2.2. By Type Market Share Analysis
 - 6.3.6.2.3. By Application Type Market Share Analysis
- 6.3.7. Australia Electric Drone 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 Technology Type Market Share Analysis
 - 6.3.7.2.2. By Type Market Share Analysis

6.3.7.2.3. By Application Type Market Share Analysis

7. EUROPE & CIS ELECTRIC DRONE MARKET OUTLOOK

7.1. Market Size & Forecast

7.1.1. By Value

7.2. Market Share & Forecast

7.2.1. By Technology Type Market Share Analysis

7.2.2. By Type Market Share Analysis

7.2.3. By Application Type Market Share Analysis

7.2.4. By Country Market Share Analysis

7.2.4.1. Germany Market Share Analysis

7.2.4.2. Spain Market Share Analysis

7.2.4.3. France Market Share Analysis

7.2.4.4. Russia Market Share Analysis

7.2.4.5. Italy Market Share Analysis

7.2.4.6. United Kingdom Market Share Analysis

7.2.4.7. Belgium Market Share Analysis

7.2.4.8. Rest of Europe & CIS Market Share Analysis

7.3. Europe & CIS: Country Analysis

7.3.1. Germany Electric Drone 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 Technology Type Market Share Analysis

7.3.1.2.2. By Type Market Share Analysis

7.3.1.2.3. By Application Type Market Share Analysis

7.3.2. Spain Electric Drone 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 Technology Type Market Share Analysis

7.3.2.2.2. By Type Market Share Analysis

7.3.2.2.3. By Application Type Market Share Analysis

7.3.3. France Electric Drone 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 Technology Type Market Share Analysis

- 7.3.3.2.2. By Type Market Share Analysis
- 7.3.3.2.3. By Application Type Market Share Analysis
- 7.3.4. Russia Electric Drone 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 Technology Type Market Share Analysis
 - 7.3.4.2.2. By Type Market Share Analysis
 - 7.3.4.2.3. By Application Type Market Share Analysis
- 7.3.5. Italy Electric Drone Market Outlook
 - 7.3.5.1. Market Size & Forecast
 - 7.3.5.1.1. By Value
 - 7.3.5.2. Market Share & Forecast
 - 7.3.5.2.1. By Technology Type Market Share Analysis
 - 7.3.5.2.2. By Type Market Share Analysis
 - 7.3.5.2.3. By Application Type Market Share Analysis
- 7.3.6. United Kingdom Electric Drone 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 Technology Type Market Share Analysis
 - 7.3.6.2.2. By Type Market Share Analysis
 - 7.3.6.2.3. By Application Type Market Share Analysis
- 7.3.7. Belgium Electric Drone 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 Technology Type Market Share Analysis
 - 7.3.7.2.2. By Type Market Share Analysis
 - 7.3.7.2.3. By Application Type Market Share Analysis

8. NORTH AMERICA ELECTRIC DRONE MARKET OUTLOOK

- 8.1. Market Size & Forecast
 - 8.1.1. By Value
- 8.2. Market Share & Forecast
 - 8.2.1. By Technology Type Market Share Analysis
 - 8.2.2. By Type Market Share Analysis
 - 8.2.3. By Application Type Market Share Analysis

- 8.2.4. By Country Market Share Analysis
 - 8.2.4.1. United States Market Share Analysis
 - 8.2.4.2. Mexico Market Share Analysis
 - 8.2.4.3. Canada Market Share Analysis
- 8.3. North America: Country Analysis
 - 8.3.1. United States Electric Drone 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 Technology Type Market Share Analysis
 - 8.3.1.2.2. By Type Market Share Analysis
 - 8.3.1.2.3. By Application Type Market Share Analysis
 - 8.3.2. Mexico Electric Drone 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 Technology Type Market Share Analysis
 - 8.3.2.2.2. By Type Market Share Analysis
 - 8.3.2.2.3. By Application Type Market Share Analysis
 - 8.3.3. Canada Electric Drone 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 Technology Type Market Share Analysis
 - 8.3.3.2.2. By Type Market Share Analysis
 - 8.3.3.2.3. By Application Type Market Share Analysis

9. SOUTH AMERICA ELECTRIC DRONE MARKET OUTLOOK

- 9.1. Market Size & Forecast
 - 9.1.1. By Value
- 9.2. Market Share & Forecast
 - 9.2.1. By Technology Type Market Share Analysis
 - 9.2.2. By Type Market Share Analysis
 - 9.2.3. By Application Type Market Share Analysis
 - 9.2.4. By Country Market Share Analysis
 - 9.2.4.1. Brazil Market Share Analysis
 - 9.2.4.2. Argentina Market Share Analysis
 - 9.2.4.3. Colombia Market Share Analysis

- 9.2.4.4. Rest of South America Market Share Analysis
- 9.3. South America: Country Analysis
 - 9.3.1. Brazil Electric Drone 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 Technology Type Market Share Analysis
 - 9.3.1.2.2. By Type Market Share Analysis
 - 9.3.1.2.3. By Application Type Market Share Analysis
 - 9.3.2. Colombia Electric Drone 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 Technology Type Market Share Analysis
 - 9.3.2.2.2. By Type Market Share Analysis
 - 9.3.2.2.3. By Application Type Market Share Analysis
 - 9.3.3. Argentina Electric Drone 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 Technology Type Market Share Analysis
 - 9.3.3.2.2. By Type Market Share Analysis
 - 9.3.3.2.3. By Application Type Market Share Analysis

10. MIDDLE EAST & AFRICA ELECTRIC DRONE MARKET OUTLOOK

- 10.1. Market Size & Forecast
 - 10.1.1. By Value
- 10.2. Market Share & Forecast
 - 10.2.1. By Technology Type Market Share Analysis
 - 10.2.2. By Type Market Share Analysis
 - 10.2.3. By Application Type Market Share Analysis
 - 10.2.4. By Country Market Share Analysis
 - 10.2.4.1. South Africa Market Share Analysis
 - 10.2.4.2. Turkey Market Share Analysis
 - 10.2.4.3. Saudi Arabia Market Share Analysis
 - 10.2.4.4. UAE Market Share Analysis
 - 10.2.4.5. Rest of Middle East & Africa Market Share Analysis
- 10.3. Middle East & Africa: Country Analysis

- 10.3.1. South Africa Electric Drone 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 Technology Type Market Share Analysis
 - 10.3.1.2.2. By Type Market Share Analysis
 - 10.3.1.2.3. By Application Type Market Share Analysis
- 10.3.2. Turkey Electric Drone 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 Technology Type Market Share Analysis
 - 10.3.2.2.2. By Type Market Share Analysis
 - 10.3.2.2.3. By Application Type Market Share Analysis
- 10.3.3. Saudi Arabia Electric Drone 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 Technology Type Market Share Analysis
 - 10.3.3.2.2. By Type Market Share Analysis
 - 10.3.3.2.3. By Application Type Market Share Analysis
- 10.3.4. UAE Electric Drone 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 Technology Type Market Share Analysis
 - 10.3.4.2.2. By Type Market Share Analysis
 - 10.3.4.2.3. By Application Type Market Share Analysis

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. Raytheon Technologies Corporation

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. Aeronautics Ltd.

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)

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. AgEagle Aerial Systems, Inc.

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. SZ DJI Technology Co., Ltd.
 - 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. FLIR Systems, Inc.
 - 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
- 14.1.9. Lockheed Martin Corporation.
 - 14.1.9.1. Company Details
 - 14.1.9.2. Key Product Offered
 - 14.1.9.3. Financials (As Per Availability)
 - 14.1.9.4. Recent Developments
 - 14.1.9.5. Key Management Personnel
- 14.1.10. Parrot Drones SAS
 - 14.1.10.1. Company Details
 - 14.1.10.2. Key Product Offered
 - 14.1.10.3. Financials (As Per Availability)
 - 14.1.10.4. Recent Developments
 - 14.1.10.5. Key Management Personnel

15. STRATEGIC RECOMMENDATIONS

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

16. ABOUT US & DISCLAIMER

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