

Europe Tethered Drone Market Size and Forecast (2021 - 2031), Regional Share, Trend, and Growth Opportunity Analysis Report Coverage: By Type (Quadcopter and Multicopter), End User (Military and Commercial), Commercial (Energy & Power, Media & Entertainment, Telecom, and Others), and Application (Inspection/Surveying or Mapping, Law Enforcement, Search & Rescue, and Others)

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Abstracts

The Europe Tethered Drone Market is projected to grow significantly, reaching an estimated US\$ 723.0 million by 2031, up from US\$ 127.8 million in 2024. This growth represents a remarkable compound annual growth rate (CAGR) of 29.7% from 2025 to 2031. The market is primarily segmented into key countries including France, Germany, Italy, the UK, Russia, and the Rest of Europe, which encompasses Spain, Switzerland, Norway, and Ukraine.

Key players in the European tethered drone market include Elistair, Valofly, and Fotokite, who are actively developing tethered drones for both military and commercial applications. These applications span various sectors such as energy and power, mining, agriculture, media, sports, and telecommunications. The predominant use of tethered drone technology in Europe is for defense purposes, with government investments aimed at enhancing national security and meeting regional demands. For instance, in March 2025, Elistair secured a significant contract to supply 13 surveillance tethered drones to Terra Spatium, a Greek company, for integration into the Hellenic Fire Service's Mobile Operations Centers. Additionally, in November 2023, Elistair unveiled KHRONOS, an automated tethered drone system designed for intelligence, surveillance, and reconnaissance (ISR) missions in challenging

environments. Earlier, in May 2022, Elistair signed an agreement with the French Defense Ministry to supply ORION 2 tethered UAVs, which have passed security certification tests, making them suitable for enhancing surveillance systems at missile test sites.

The use of tethered drones extends beyond military applications; they are increasingly utilized in law enforcement, traffic management, and search and rescue operations. Companies like Acecore Technologies, Elistair, Fotokite, and Novadem are among the manufacturers supplying tethered drones for various applications, generating substantial revenue through contracts with authorities worldwide.

The market segmentation reveals that by type, the tethered drone market is divided into quadcopters and multicopters, with quadcopters holding the largest market share in 2024. In terms of end users, the military sector dominated the market, while the commercial segment is further divided into energy and power, media and entertainment, telecommunications, and others, with energy and power leading in 2024. The application segment includes inspection, surveying, mapping, law enforcement, and search and rescue, with law enforcement being the largest application area in 2024.

The demand for tethered drones is driven by their ability to enhance operational efficiency in various sectors. For example, in wind turbine maintenance, tethered drones facilitate real-time visual inspections, allowing operators to quickly identify faults and defects, thereby improving maintenance management. Similarly, in building restoration, tethered drones provide essential thermographic imaging and inspections, helping to pinpoint areas needing restoration more efficiently.

In infrastructure maintenance, such as for road and rail bridges, tethered drones offer a fast and cost-effective solution for conducting visual inspections without disrupting usability. This capability is crucial as the demand for regular maintenance of critical infrastructures continues to grow.

Country-wise, Russia currently holds the largest share of the tethered drone market in Europe, primarily due to its military applications. As a leading military power, Russia has rapidly advanced its tethered drone technology, particularly in response to the ongoing conflict in Ukraine. The demand for tethered drones in military operations is increasing, with applications for border security and surveillance becoming more prevalent. Notably, the Cerberus system, a truck-mounted platform capable of launching and controlling swarms of tethered drones, exemplifies the advanced capabilities being developed in this sector.

The competitive landscape of the Europe tethered drone market features several key players, including Mistral Solutions Pvt. Ltd., Acecore Technologies, Elistair, Fotokite AG, Hoverfly Technologies, Novadem, SKY SAPIENCE, Skyshot Private Limited, Menet Aero (NTP Inc.), and Zenith Aerotech. These companies are pursuing various strategies such as expansion, product innovation, and mergers and acquisitions to enhance their

market presence and offer innovative solutions to consumers.

In summary, the Europe tethered drone market is poised for substantial growth, driven by advancements in technology and increasing applications across military and commercial sectors. The ongoing developments in drone technology, particularly in defense, are expected to further propel market demand and create new opportunities for industry players.

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