

North America 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 North America Tethered Drone Market is projected to grow significantly, reaching an estimated US\$ 981.0 million by 2031, up from US\$ 184.7 million in 2024, reflecting a robust compound annual growth rate (CAGR) of 28.5% from 2025 to 2031. This growth is driven by the increasing applications of tethered drones across military and commercial sectors, with a notable emphasis on their utility in critical situations.

The market is primarily segmented into the United States, Canada, and Mexico, with the U.S. leading the charge. The U.S. Department of Defense is a key player in this market, utilizing tethered drones for continuous surveillance, intelligence gathering, and security at critical infrastructure sites and remote military bases. The tethered drones' ability to maintain near-limitless flight endurance due to their ground-based power supply makes them particularly suitable for long-duration missions, albeit with some limitations in mobility.

In recent years, defense spending in North America has seen a significant increase, rising from US\$ 886.3 billion in 2022 to approximately US\$ 968.4 billion in 2023, and projected to be around US\$ 916 billion in 2024. This surge in defense expenditure underscores the U.S. government's commitment to enhancing its defense capabilities, which includes the integration of advanced drone technologies. The defense budget

encompasses various aspects such as operation and maintenance, procurement, research and development, testing and evaluation, and military personnel costs, all of which contribute to the growing demand for tethered drones.

Manufacturers in North America are actively developing tethered drones for a variety of applications, including surveillance, monitoring, law enforcement, and traffic management. Collaborations with various vendors are common as companies strive to innovate and enhance their product offerings. For example, in October 2024, Hoverfly Technologies Inc. received a US\$ 10 million contract from a U.S. government agency to develop tethered drones, highlighting the increasing investment in this technology. Additionally, the North Carolina Department of Transportation has initiated testing of tethered drone systems to improve roadway safety, demonstrating the expanding commercial applications of this technology.

The North America Tethered Drone Market can be segmented by type, end user, commercial application, and specific applications. By type, the 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 includes industries such as energy and power, media and entertainment, and telecommunications, with the 'Others' category leading in 2024. Furthermore, applications of tethered drones include inspection, surveying, law enforcement, and search and rescue, with law enforcement being the largest segment in 2024.

A notable trend in the market is the increasing adoption of tethered drones for search and rescue operations. Their extended operational capabilities provide essential support to rescue teams in remote locations, particularly in compliance with strict flight regulations. Tethered drones are advantageous in urban and densely populated areas where free-flying drones face regulatory challenges. For instance, during emergencies like earthquakes or building collapses, tethered drones can offer real-time situational awareness, assess structural damage, and locate survivors from a safe distance. Agencies like FEMA utilize drones for disaster reconnaissance, enhancing coordination among rescue teams.

The U.S. market for tethered drones is characterized by their use in military operations, law enforcement, and border security. The demand for advanced tethered drones is driven by the need for technological updates in the defense sector. These drones play a crucial role in monitoring events, managing traffic, and ensuring security at large gatherings. For example, in December 2024, Hoverfly Technologies announced its involvement in the U.S. Army's Variable Height Antenna program, showcasing the integration of tethered drones into critical military operations.

Key players in the North America Tethered Drone Market include Mistral Solutions Pvt. Ltd., Acecore Technologies, Elistair, Fotokite AG, Hoverfly Technologies, Novadem,

SKY SAPIENCE, and others. 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 North America Tethered Drone Market is poised for substantial growth, driven by advancements in technology and increasing applications across military and commercial sectors. The focus on enhancing operational capabilities and compliance with regulatory frameworks will continue to shape the market landscape in the coming years.

Contents

1. INTRODUCTION

- 1.1 Report Guidance
- 1.2 Market Segmentation

2. EXECUTIVE SUMMARY

- 2.1 Key Insights
- 2.2 Market Attractiveness

3. RESEARCH METHODOLOGY

- 3.1 Secondary Research
- 3.2 Primary Research
 - 3.2.1 Hypothesis formulation:
 - 3.2.2 Macroeconomic factor analysis:
 - 3.2.3 Developing base number:
 - 3.2.4 Data Triangulation:
 - 3.2.5 Country-level data:

4. TETHERED DRONE MARKET LANDSCAPE

- 4.1 Market Overview
- 4.2 Porter's Five Forces Analysis
- 4.3 Ecosystem Analysis
 - 4.3.1 List of Vendors in the Value Chain

5. NORTH AMERICA TETHERED DRONE MARKET - KEY MARKET DYNAMICS

- 5.1 Market Drivers
- 5.2 Market Restraints
- 5.3 Market Opportunities
- 5.4 Future Trends
- 5.5 Impact of Drivers and Restraints:

6. TETHERED DRONE MARKET - NORTH AMERICA MARKET ANALYSIS

6.1 North America Tethered Drone Market Revenue (US\$ Million), 2024 - 2031

6.2 North America Tethered Drone Market Forecast and Analysis

7. NORTH AMERICA TETHERED DRONE MARKET REVENUE ANALYSIS - BY TYPE

7.1 Quadcopter

7.1.1 Overview

7.1.2 Quadcopter: North America Tethered Drone Market - Revenue and Forecast, 2021 - 2031 (US\$ Million)

7.2 Multicopter

7.2.1 Overview

7.2.2 Multicopter: North America Tethered Drone Market - Revenue and Forecast, 2021 - 2031 (US\$ Million)

8. NORTH AMERICA TETHERED DRONE MARKET REVENUE ANALYSIS - BY END USER

8.1 Military

8.1.1 Overview

8.1.2 Military: North America Tethered Drone Market - Revenue and Forecast, 2021 - 2031 (US\$ Million)

8.2 Commercial

8.2.1 Overview

8.2.2 Commercial: North America Tethered Drone Market - Revenue and Forecast, 2021 - 2031 (US\$ Million)

9. NORTH AMERICA TETHERED DRONE MARKET REVENUE ANALYSIS - BY COMMERCIAL

9.1 Energy and Power

9.1.1 Overview

9.1.2 Energy and Power: North America Tethered Drone Market - Revenue and Forecast, 2021 - 2031 (US\$ Million)

9.2 Media and Entertainment

9.2.1 Overview

9.2.2 Media and Entertainment: North America Tethered Drone Market - Revenue and Forecast, 2021 - 2031 (US\$ Million)

9.3 Telecom

9.3.1 Overview

9.3.2 Telecom: North America Tethered Drone Market - Revenue and Forecast, 2021 - 2031 (US\$ Million)

9.4 Others

9.4.1 Overview

9.4.2 Others: North America Tethered Drone Market - Revenue and Forecast, 2021 - 2031 (US\$ Million)

10. NORTH AMERICA TETHERED DRONE MARKET REVENUE ANALYSIS - BY APPLICATION

10.1 Inspection or Surveying or Mapping

10.1.1 Overview

10.1.2 Inspection or Surveying or Mapping: North America Tethered Drone Market - Revenue and Forecast, 2021 - 2031 (US\$ Million)

10.2 Law Enforcement

10.2.1 Overview

10.2.2 Law Enforcement: North America Tethered Drone Market - Revenue and Forecast, 2021 - 2031 (US\$ Million)

10.3 Search and Rescue

10.3.1 Overview

10.3.2 Search and Rescue: North America Tethered Drone Market - Revenue and Forecast, 2021 - 2031 (US\$ Million)

10.4 Others

10.4.1 Overview

10.4.2 Others: North America Tethered Drone Market - Revenue and Forecast, 2021 - 2031 (US\$ Million)

11. NORTH AMERICA TETHERED DRONE MARKET - COUNTRY ANALYSIS

11.1 North America

11.1.1 North America Tethered Drone Market Revenue and Forecast and Analysis - by Country

11.1.1.1 North America Tethered Drone Market Revenue and Forecast and Analysis - by Country

11.1.2.2 United States: North America Tethered Drone Market - Revenue and Forecast, 2021 - 2031 (US\$ Million)

11.1.2.2.1 United States: North America Tethered Drone Market Share - by Type

11.1.2.2.2 United States: North America Tethered Drone Market Share - by End

User

11.1.2.2.3 United States: North America Tethered Drone Market Share - by Commercial

11.1.2.2.4 United States: North America Tethered Drone Market Share - by Application

11.2.3.3 Canada: North America Tethered Drone Market - Revenue and Forecast, 2021 - 2031 (US\$ Million)

11.2.3.3.1 Canada: North America Tethered Drone Market Share - by Type

11.2.3.3.2 Canada: North America Tethered Drone Market Share - by End User

11.2.3.3.3 Canada: North America Tethered Drone Market Share - by Commercial

11.2.3.3.4 Canada: North America Tethered Drone Market Share - by Application

11.3.4.4 Mexico: North America Tethered Drone Market - Revenue and Forecast, 2021 - 2031 (US\$ Million)

11.3.4.4.1 Mexico: North America Tethered Drone Market Share - by Type

11.3.4.4.2 Mexico: North America Tethered Drone Market Share - by End User

11.3.4.4.3 Mexico: North America Tethered Drone Market Share - by Commercial

11.3.4.4.4 Mexico: North America Tethered Drone Market Share - by Application

12 COMPETITIVE LANDSCAPE

12.1 Heat Map Analysis by Key Players

12.2 Company Positioning & Concentration

13 INDUSTRY LANDSCAPE

13.1 Overview

13.2 New Product Development

13.3 Merger and Acquisition

13.4 Other Strategic Developments

14 COMPANY PROFILES

14.1 Mistral Solutions Pvt. Ltd.

14.1.1 Key Facts

14.1.2 Business Description

14.1.3 Products and Services

14.1.4 Financial Overview

14.1.5 SWOT Analysis

14.1.6 Key Developments

14.2 Acecore Technologies

14.2.1 Key Facts

14.2.2 Business Description

14.2.3 Products and Services

14.2.4 Financial Overview

14.2.5 SWOT Analysis

14.2.6 Key Developments

14.3 Elistair

14.3.1 Key Facts

14.3.2 Business Description

14.3.3 Products and Services

14.3.4 Financial Overview

14.3.5 SWOT Analysis

14.3.6 Key Developments

14.4 Fotokite AG

14.4.1 Key Facts

14.4.2 Business Description

14.4.3 Products and Services

14.4.4 Financial Overview

14.4.5 SWOT Analysis

14.4.6 Key Developments

14.5 Hoverfly Technologies

14.5.1 Key Facts

14.5.2 Business Description

14.5.3 Products and Services

14.5.4 Financial Overview

14.5.5 SWOT Analysis

14.5.6 Key Developments

14.6 Novadem

14.6.1 Key Facts

14.6.2 Business Description

14.6.3 Products and Services

14.6.4 Financial Overview

14.6.5 SWOT Analysis

14.6.6 Key Developments

14.7 SKY SAPIENCE

14.7.1 Key Facts

14.7.2 Business Description

14.7.3 Products and Services

- 14.7.4 Financial Overview
- 14.7.5 SWOT Analysis
- 14.7.6 Key Developments
- 14.8 Skyshot Private Limited
 - 14.8.1 Key Facts
 - 14.8.2 Business Description
 - 14.8.3 Products and Services
 - 14.8.4 Financial Overview
 - 14.8.5 SWOT Analysis
 - 14.8.6 Key Developments
- 14.9 Menet Aero (NTP Inc.)
 - 14.9.1 Key Facts
 - 14.9.2 Business Description
 - 14.9.3 Products and Services
 - 14.9.4 Financial Overview
 - 14.9.5 SWOT Analysis
 - 14.9.6 Key Developments
- 14.10 Zenith Aerotech
 - 14.10.1 Key Facts
 - 14.10.2 Business Description
 - 14.10.3 Products and Services
 - 14.10.4 Financial Overview
 - 14.10.5 SWOT Analysis
 - 14.10.6 Key Developments

15. APPENDIX

- 15.1 About The Insight Partners

List Of Tables

LIST OF TABLES

Table 1. North America Tethered Drone Market Segmentation

Table 2. List of Vendors

Table 3. North America Tethered Drone Market - Revenue and Forecast, 2021 - 2031 (US\$ Million)

Table 4. North America Tethered Drone Market - Revenue and Forecast, 2021 - 2031 (US\$ Million) - by Type

Table 5. North America Tethered Drone Market - Revenue and Forecast, 2021 - 2031 (US\$ Million) - by End User

Table 6. North America Tethered Drone Market - Revenue and Forecast, 2021 - 2031 (US\$ Million) - by Commercial

Table 7. North America Tethered Drone Market - Revenue and Forecast, 2021 - 2031 (US\$ Million) - by Application

Table 8. North America Tethered Drone Market - Revenue and Forecast, 2021 - 2031 (US\$ Million) - by Country

Table 9. United States: North America Tethered Drone Market - Revenue and Forecast, 2021 - 2031 (US\$ Million) - by Type

Table 10. United States: North America Tethered Drone Market - Revenue and Forecast, 2021 - 2031 (US\$ Million) - by End User

Table 11. United States: North America Tethered Drone Market - Revenue and Forecast, 2021 - 2031 (US\$ Million) - by Commercial

Table 12. United States: North America Tethered Drone Market - Revenue and Forecast, 2021 - 2031 (US\$ Million) - by Application

Table 13. Canada: North America Tethered Drone Market - Revenue and Forecast, 2021 - 2031 (US\$ Million) - by Type

Table 14. Canada: North America Tethered Drone Market - Revenue and Forecast, 2021 - 2031 (US\$ Million) - by End User

Table 15. Canada: North America Tethered Drone Market - Revenue and Forecast, 2021 - 2031 (US\$ Million) - by Commercial

Table 16. Canada: North America Tethered Drone Market - Revenue and Forecast, 2021 - 2031 (US\$ Million) - by Application

Table 17. Mexico: North America Tethered Drone Market - Revenue and Forecast, 2021 - 2031 (US\$ Million) - by Type

Table 18. Mexico: North America Tethered Drone Market - Revenue and Forecast, 2021 - 2031 (US\$ Million) - by End User

Table 19. Mexico: North America Tethered Drone Market - Revenue and Forecast, 2021

- 2031 (US\$ Million) - by Commercial

Table 20. Mexico: North America Tethered Drone Market - Revenue and Forecast, 2021

- 2031 (US\$ Million) - by Application

Table 21. Heat Map Analysis by Key Players

List Of Figures

LIST OF FIGURES

- Figure 1. North America Tethered Drone Market Segmentation - Country
- Figure 2. Porter's Analysis
- Figure 3. Ecosystem: Tethered Drone Market
- Figure 4. North America Tethered Drone Market - Key Market Dynamics
- Figure 5. Impact Analysis of Drivers and Restraints
- Figure 6. North America Tethered Drone Market Revenue (US\$ Million), 2024 - 2031
- Figure 7. North America Tethered Drone Market Share (%) - by Type, 2024 and 2031
- Figure 8. Quadcopter: North America Tethered Drone Market - Revenue and Forecast, 2021 - 2031 (US\$ Million)
- Figure 9. Multicopter: North America Tethered Drone Market - Revenue and Forecast, 2021 - 2031 (US\$ Million)
- Figure 10. North America Tethered Drone Market Share (%) - by End User, 2024 and 2031
- Figure 11. Military: North America Tethered Drone Market - Revenue and Forecast, 2021 - 2031 (US\$ Million)
- Figure 12. Commercial: North America Tethered Drone Market - Revenue and Forecast, 2021 - 2031 (US\$ Million)
- Figure 13. North America Tethered Drone Market Share (%) - by Commercial, 2024 and 2031
- Figure 14. Energy and Power: North America Tethered Drone Market - Revenue and Forecast, 2021 - 2031 (US\$ Million)
- Figure 15. Media and Entertainment: North America Tethered Drone Market - Revenue and Forecast, 2021 - 2031 (US\$ Million)
- Figure 16. Telecom: North America Tethered Drone Market - Revenue and Forecast, 2021 - 2031 (US\$ Million)
- Figure 17. Others: North America Tethered Drone Market - Revenue and Forecast, 2021 - 2031 (US\$ Million)
- Figure 18. North America Tethered Drone Market Share (%) - by Application, 2024 and 2031
- Figure 19. Inspection or Surveying or Mapping: North America Tethered Drone Market - Revenue and Forecast, 2021 - 2031 (US\$ Million)
- Figure 20. Law Enforcement: North America Tethered Drone Market - Revenue and Forecast, 2021 - 2031 (US\$ Million)
- Figure 21. Search and Rescue: North America Tethered Drone Market - Revenue and Forecast, 2021 - 2031 (US\$ Million)

Figure 22. Others: North America Tethered Drone Market - Revenue and Forecast, 2021 - 2031 (US\$ Million)

Figure 23. North America Tethered Drone Market Breakdown by Key Countries, 2024 and 2031 (%)

Figure 24. United States: North America Tethered Drone Market - Revenue and Forecast, 2021 - 2031 (US\$ Million)

Figure 25. Canada: North America Tethered Drone Market - Revenue and Forecast, 2021 - 2031 (US\$ Million)

Figure 26. Mexico: North America Tethered Drone Market - Revenue and Forecast, 2021 - 2031 (US\$ Million)

Figure 27. Company Positioning & Concentration

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