

North America Unmanned Traffic Management Market Forecast to 2030 – COVID-19 Impact and Regional Analysis – by Type (Persistent UTM and Non-Persistent UTM), Component (Hardware and Software), Application (Communications, Navigation, Surveillance & Monitoring, and Others), and End Use (Agriculture & Forestry, Logistics & Transportation, Surveillance, and Others)

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Abstracts

The North America unmanned traffic management market is expected to grow from US\$ 352.83 million in 2022 to US\$ 1,251.70 million by 2030. It is estimated to grow at a CAGR of 17.1% from 2022 to 2030.

Surge in Adoption of Drones in Logistics and Supply Chain Management is Driving the North America Unmanned Traffic Management Market

Supply chain management (SCM) is a critical aspect of most businesses and can directly or indirectly impact the functioning of enterprises. With the rising adoption of Industry 4.0 and increasing integration of Internet of Things (IoT)-enabled devices in all business spheres, SCM is also witnessing rising technology integration. While the adoption of technology has ramifications, the benefits of such adoption mostly outweigh the challenges. Advantages include better efficiency, reduced operational cost, and data safety. With rising technology adoption, UAVs and UAS technologies are gaining prominence in the transportation and logistics industry owing to the benefits offered. Drones are being utilized in different points across a supply chain, such as inventory management, tracking of 'lost' goods, transfer of goods between warehouses, and last-

mile delivery. Relatively newer applications of drones include truck drone collaborations, referred to as multi-UAV parallel delivery, wherein drones execute deliveries to multiple destinations straight off the delivery truck. The development of cargo UAVs, capable of carrying large weights across several hundred miles, further promotes the adoption of drones in this industry. With rising trials of drone-based delivery in the logistics and transportation industry, the safe movement of drones in available airspace is subsequently gaining prominence. Thus, the demand for UTM solutions is rising to enable the commercialization of drone-based package delivery and safe operations of multiple drones across congested low-altitude aerospace.

North America Unmanned Traffic Management Market Overview

The US, Canada, and Mexico are the key contributors to the North America unmanned traffic management market. In 2021, the US led the market with a substantial revenue share, followed by Canada. Further, Canada is expected to register the highest CAGR in the North America unmanned traffic management market from 2022 to 2030. The increasing demand for drones in North America for various commercial applications, such as communication, navigation, surveillance, and monitoring, is expected to drive the demand for unmanned traffic management systems. Also, the supportive government initiatives from Federal Aviation Administration (FAA), one of the largest transportation agency, regulating the civil aviation industry is anticipated to bolster the demand for unmanned traffic management systems across North America. Also, the rising demand for last-mile delivery solutions in eCommerce sector, food delivery services, and medical emergency services is pushing the demand for drone logistics, in turn, augmenting the demand for unmanned traffic management solutions. Companies engaged in the last mile and small package delivery are significantly deploying drones to cut costs and improve operational efficiency. For instance, Prime Air delivery drones are capable of shipping out parcels directly from warehouses to customers within 30 min. Hence the growing deployment of drones in transportation application is necessitating the need for unmanned traffic management system, which helps drive the market growth. The supportive government initiatives is also leveraging the market dynamics. Also, Federal Aviation Administration establishes rules for operating drones and to support this UTM ensure coordination between flights by improving communication and measuring performance of drones. According to the Federal Aviation Administration, the number of small UAS (less than 55 pounds) used for commercial purposes is expected to increase by more than 60%, from ~488,000 in 2016 to ~784,000 by 2024, in circulation; moreover, more than 1.5 million small unmanned aircraft systems (UASs) would be in use for recreational purposes by 2024. Thus, such a predicted surge in the use of unmanned aircraft systems underlines the

need for traffic management systems during the forecast period. For instance, in August 2022, IN-FLIGHT Data, one of the experienced operators across the region of advanced drones, in partnership with AirMatrix, a leading remote traffic management software provider, had successfully conducted one of Earth's first "SAIL 4" urban drone operations, while beyond the line of sight of the pilot, and over urban neighborhood populations. Such initiative has been pushing the market vendors to come up with new solutions to cater to the growing demand for North America unmanned traffic management system market.

North America Unmanned Traffic Management Market Revenue and Forecast to 2030 (US\$ Million)

North America Unmanned Traffic Management Market Segmentation

The North America unmanned traffic management market is segmented into type, component, application, end use, and country.

Based on type, the North America unmanned traffic management market is bifurcated into persistent UTM and non-persistent UTM. In 2022, the persistent UTM segment registered a larger share in the North America unmanned traffic management market.

Based on component, the North America unmanned traffic management market is bifurcated into hardware and software. In 2022, the hardware segment registered a larger share in the North America unmanned traffic management market.

Based on application, the North America unmanned traffic management market is segmented into communications, navigation, surveillance & monitoring, and others. In 2022, the communications segment registered a largest share in the North America unmanned traffic management market.

Based on end use, the North America unmanned traffic management market is segmented into agriculture & forestry, logistics & transportation, surveillance, and others. In 2022, the surveillance segment registered a largest share in the North America unmanned traffic management market.

Based on country, the North America unmanned traffic management market is segmented into the US, Canada, and Mexico. In 2022, the US segment registered a largest share in the North America unmanned traffic management market.

Lockheed Martin Corp; Leonardo SpA; Collins Aerospace; Altitude Angel Ltd; Frequentis AG; AirMap Inc; Unifly NV; OneSky Systems Inc; Airbus SE; and Thales SA are the leading companies operating in the North America unmanned traffic management market.

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