

South & Central 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 South and Central America (SAM) tethered drone market is poised for significant growth, with projections indicating an increase from US\$ 3.2 million in 2024 to US\$ 11.9 million by 2031, reflecting a robust compound annual growth rate (CAGR) of 21.2% from 2025 to 2031. This growth is driven by the rising demand for tethered drones across various sectors, particularly in Brazil and Colombia, where these drones are increasingly utilized for applications such as event monitoring, traffic management, and law enforcement surveillance.

Tethered drones are gaining popularity due to their ability to maintain longer flight times compared to traditional battery-operated drones, as they draw power directly from a ground station. This capability allows them to remain airborne for extended periods, making them ideal for continuous surveillance and monitoring operations. The demand for 24/7 monitoring solutions is a key factor propelling the tethered drone market in the region.

In the defense sector, tethered drones are being deployed for border surveillance and monitoring, enhancing security measures in countries like Brazil, Argentina, Colombia, and Chile. These drones are also employed in the oil and gas industry, as well as in power transmission and mining, for routine inspections, leak detection, and security

patrols in remote or hazardous environments. Their ability to provide rapid aerial platforms for search and rescue operations, wildfire tracking, flood assessments, and damage surveys further underscores their value, especially in disaster-prone areas where traditional communication methods may fail.

The market segmentation reveals that by type, the SAM 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 is the largest segment, while the commercial sector is categorized into energy and power, media and entertainment, telecom, and others, with energy and power leading in market share.

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, particularly in remote locations. Tethered drones are advantageous in areas with strict flight regulations, as their predictable operation simplifies compliance and airspace management. This makes them particularly suitable for urban environments where free-flying drones face more scrutiny. In emergency situations, such as earthquakes or building collapses, tethered drones can deliver real-time situational awareness to command centers, aiding in damage assessment and survivor identification from a safe distance.

Brazil stands out as a major player in the tethered drone market, leveraging these technologies in agriculture for crop mapping and pest management, which helps farmers optimize resource use and improve product quality. The country is home to several established developers of tethered drones, such as Jetwind Brasil Services and Technologies, which has created advanced models like the JETWIND RQ-17 ION for military, security, and commercial applications. Other notable companies include XMobots and Skydrones Tecnologia Avi?nica, which focus on various applications including surveying and security.

The tethered drone market in South and Central America is also benefiting from technological advancements, such as the integration of HD and thermal sensors, AI-driven analytics, and robust tether management systems. These innovations are particularly relevant for addressing the operational challenges posed by Brazil's vast and diverse landscapes. The development of drones equipped with real-time communication systems enhances their surveillance and inspection capabilities, further driving market growth.

Key players in the SAM tethered drone market include 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 actively pursuing strategies such as product innovation, market expansion, and mergers and acquisitions to enhance their offerings and increase market share.

In summary, the South and Central America tethered drone market is on a growth trajectory, fueled by increasing demand across various sectors, particularly in defense, agriculture, and emergency response. The unique advantages of tethered drones, including extended flight times and operational stability, position them as a vital tool for surveillance, monitoring, and inspection in the region.

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