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Homeland Security and Commercial Unmanned Aircraft Systems (UAS) Market Shares Strategies, and Forecasts, Worldwide, 2011 to 2017

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Abstracts

WinterGreen Research announces that it has a new study on homeland security unmanned aircraft systems (UAS). Homeland security unmanned aircraft systems (UAS) markets grow as the governments worldwide realize these affordable airplanes provide a less expensive way to provide defense of a nation's borders and deterrent to intruders. These markets are poised to grow based on the creation of new services efficiencies that accrue from improved technologies. New composite materials systems are achieving consistent price declines throughout the forecast period.

The 2011 study has 653 pages and 216 tables and figures. Worldwide markets are poised to achieve significant growth as governments worldwide move to implement more cost efficient military systems and weapons delivery modalities. Vendors are building out localized distribution networks that support a UAS system in a local environment, providing remote control of airplanes.

The military UAS technology is migrating to new markets; commercial drone technology is increasingly available beyond military circles. Commercial applications are spreading fast. An unmanned aircraft that can fly a predetermined route costs a few hundred bucks to build and can be operated by iPhone.

Homeland security and commercial unmanned aircraft system (UAS) are used by countries to protect their borders and get aerial views of commercial projects. Complex systems include ground stations and other elements in addition to the aircraft. UAS are used by the International Civil Aviation Organization (ICAO) and other government aviation regulatory organizations.

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The requirement for rapid responses to complicated contingencies and the enduring need for ever more persistent surveillance to meet each of the contingencies requires development of extended persistence, pre-positioning, maritime air take-off and landing and aerial refueling. Thin film batteries become significant. Enhanced strike capability and payloads are evolving: UASs are required to carry out an increasing number of strike missions on the battlefield. These missions mandate UASs be able to be equipped with flexible payloads and advanced autonomous target recognition capabilities. More UASs with strike capabilities will be required.

Commercial UAS may include air cargo planes flown from a remote location using a video controller. This significantly reduces the cost of logistics for moving anything. The ability to reduce the cost of transport of goods, by reducing the labor component is a significant advance in commercial activity.

Unmanned aircraft systems (UAS) are achieving a level of relatively early maturity. Fleets of unmanned aircraft systems have begun to evolve. The U.S. Army has achieved one million flight hours for its unmanned aircraft systems fleet. This market maturity is anticipated to extend the usefulness of the technologies into homeland security and commercial markets. Unmanned aerial systems have good handling characteristics. Units are designed to perform high-speed, long-endurance, more covert, multi-mission intelligence, surveillance, and reconnaissance (ISR) and precision-strike missions over land or sea.

Units feature a variety of internal weapons loads, including 2,000 lb Joint Direct Attack Munition (JDAM), an Electro-optical/Infrared (EO/IR) sensor, and an all-weather GA-ASI Lynx® Synthetic Aperture Radar/Ground Moving Target Indicator (SAR/GMTI), maximizing both long loiter ISR and weapons carriage capabilities.

UAS offers the war fighter persistent situational awareness and strike mission affordability. For the cost of one manned fighter aircraft, multiple-swarm configured units can cover an area of interest, providing 24/7 ISR coverage, target identification, neutralization, mission flexibility, and attrition tolerance. Some UAS have the capability to perform manned aircraft missions.

According to Susan Eustis, primary author of the study, "growth is spurred by increasing interest from homeland security planning departments. The governments worldwide are moving toward embracing unmanned aircraft systems (UAS) because of the increased intelligence capability and deterrent efficiency combined. The versatility of single aircraft, and the ability to use multiple inexpensive aircraft for different purposes is a

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formidable and compelling market driver."

Unmanned aerial systems (UAS) markets at $84 million in 2010 are forecast to reach $2.3 billion dollars, worldwide by 2017. US UAS aircraft have flown one million miles over the last four years and are set to fly one million more in the next year. The pace of homeland security and commercial utilization is picking up as planners realize that UAS are significantly more efficient than manned aircraft in every way.

Market growth of unmanned aircraft systems (UAS) markets is a result of the ability to fly longer, see better, provide more useful imaging, put better sensor packages in place, achieve better maneuverability, and implement new technology. The improved control units that permit handlers to work remotely improves systems capability.

Units more easily portable, more battery technology permits the ability for systems to stay in the air longer. New systems permit refueling in the air.

Companies Profiled

Market Leaders
- Boeing
- Lockheed Martin
- General Atomics Aeronautical Systems Inc. (GA ASI)
- Northrop Grumman
- L-3 Communications Corp.
- Aurora Flight Sciences
- Integrated Dynamics
- Textron
- AeroVironment
- BAE Systems

Market Participants
- AB Precision (Poole) Ltd
- Airborne Technologies
- Applied Research Associates, Inc.
- ARA
- ATK
- BAE Systems Large UGV
- 5-42
- BAE Systems Plc (BAES.L) Hired
- Black Ram Engineering

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Boeing-/ iRobot
Caterpillar
Challis Helicopters Inc. / Challis Heliplane UAV
Challis Heliplanes
Concurrent Technologies
Corsair
DiSTI Software For UAV Systems
DOK-ING
Draganfly Innovations Inc.
DRS Unmanned Technologies, Inc.
Elbit Systems Ltd.,
Elbit Systems of America
Frontline Robotics G-NIUS Unmanned Ground Systems Ltd
General Dynamics / AxleTech International
GE
Harris
Insitu
National Airspace Integration Research
Integrated Dynamics
intelliDrones
InRob Tech
iRobot
John Deere
L-3 Communications Corp.,
LaserMotive
Pioneer Technology
Groups Of Unmanned Vehicles 5-180
Meggitt
BAE Mantis UAS Advanced Concept Technology
Mesa Robotics, Inc.
MRI
MLB Company
Mist Mobility Integrated Systems Technology Inc. (MMIST)
Omnitech Robotics Oshkosh
Oto Melara SpA Land Automatic
Surveillance Capabilities
Proxy Aviation Systems, Inc.
Pilot Guides Multiple UAVs
Qinetiq / Foster-Miller

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RE2, Inc.
Rolls-Royce
SESI
SESI Boeing
Stratom Warrior Tool and Payload Accessory
Telerob
Textron Systems / AAI Corporation
Textron Systems / Aerosonde
Textron /MillenWorks: Unmanned Vehicle Maker
Textron Marine & Land Systems
Thales
Versa / Allen-Vanguard
VIA Technologies

Report Methodology

This is the 345th report in a series of market research reports that provide forecasts in communications, telecommunications, the internet, computer, software, and telephone equipment. The project leaders take direct responsibility for writing and preparing each report. They have significant experience preparing industry studies. Forecasts are based on primary research and proprietary data bases. Forecasts reflect analysis of the market trends in the segment and related segments. Unit and dollar shipments are analyzed through consideration of dollar volume of each market participation in the segment. Market share analysis includes conversations with key customers of products, industry segment leaders, marketing directors, distributors, leading market participants, and companies seeking to develop measurable market share. Over 200 in-depth interviews are conducted for each report with a broad range of key participants and opinion leaders in the market segment.

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HOMELAND SECURITY AND COMMERCIAL UNMANNED AERIAL SYSTEMS (UAS) TECHNOLOGY

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