The size of the professional RPAS (Remotely Piloted Aircraft Systems) manufacturing and services market is expected to grow significantly in the next ten years, from $1 billion in 2015 to $26 billion in 2025.

The civil and commercial RPAS market is at an early development stage compared to the military and leisure sectors. Recent improvements in the regulatory context in a number of countries and technological advances have led to an increase in the number of applications using RPAS for commercial purposes, with new applications set to develop in the coming years. Their combination has led a number of companies to enter the market in search of new opportunities in a sector with strong growth potential and a large addressable market.

Agriculture was estimated to be the largest user of RPAS in 2015, accounting for 39% of units used, ahead of video & cinema and engineering & transportation infrastructure. Leading regions for the use of UAVs include Asia Pacific, Europe and North America; the commercial RPAS market is still early in the development phase in other regional markets. Japan has the most mature RPAS market, having begun use in agriculture more than 20 years ago. Other leading commercial RPAS countries include Australia, Canada, France, the U.K. and the U.S.

The large number of players present and the market’s current limited size make for a challenging environment. Many stakeholders have to deal with small levels of activity, particularly on the service provision side. A large number of operators, data analysts and software companies are small (<$1 million in revenues) and not yet profitable. Manufacturing is dominated by companies producing micro drones, used for both leisure and commercial applications; DJI is the market leader.

Services should account for 88% of the market size in 2025, with manufacturing revenues reaching greater than $3 billion. Advanced economies should be the largest RPAS markets, with North America and Europe combining for about two-thirds of the market value in 2025. The market will be driven by the larger number of RPAS in service, with more than 560,000 units added over the decade to the current total of 30,000 units. Growth in days of use should also contribute to the market’s takeoff; RPAS are expected to be used over 23 million days in 2025 up from 690,000 in 2015, representing an average of 40 days per RPAS (compare to 24 in 2015). The improved performance of RPAS (e.g., endurance related to the cost) should favor growth in use, helping RPAS become increasingly competitive versus other technologies.
Prospects for Remotely Piloted Aircraft systems is a vertical market analysis of major drivers, key issues and demand take-up for remotely piloted aircraft systems (RPAS) used for commercial and civil purposes. The report focuses on five key markets and includes market forecasts through 2025 as well as regional analysis and forecasts.

**TYPOLOGY, MARKET OVERVIEW & FORECASTS**
- RPAS: Typology & product segments
- Technological & regulatory roadmap
- RPAS units used: Current market & recent dynamics
- Pricing of RPAS services & equipment
- Market value & financial performance of RPAS industry
- SWOT analysis of RPAS market
- Forecasts: Number of RPAS units in service
- Forecasts: Market value of civil & commercial RPAS market

**INDUSTRY STRUCTURE & REGULATION**
- Commercial RPAS value chain
- Positioning of market players
- Evolution of market structure & consolidation
- Policy & regulation: Global overview

**VERTICAL MARKET FOCUS**
- Five vertical markets: Agriculture & forestry; civil protection & disaster management; engineering & transportation infrastructure; oil & energy; video & cinema
- For each vertical: Market overview & dynamics; key application areas & clients; selected case studies; drivers & inhibitors; forecasts

**REGIONAL ANALYSIS**
- Three regions: North America; Europe; Asia Pacific
- For each region: Market overview; selected country focuses; selected drivers & forecasts

**EXTENSIVE FIGURES & ANALYSIS FOR THE COMING DECADE**
TABLE OF CONTENTS

TYPOLOGY, MARKET OVERVIEW AND FORECASTS
> Methodology & acronyms
> Definition of UAV and scope of study
> Executive summary
> RPAS: Typology and product segments
> Platforms and key components
> Sensors and usages
> Technological and regulatory roadmap
> Level of development of civil and commercial RPAS applications and technology
> World map of RPAS in service by country (2015)
> RPAS units used: Current market and recent dynamics
> Pricing of RPAS services and equipment
> Market value and financial performance of RPAS industry
> SWOT analysis of RPAS market
> World map of RPAS in service and market value 2015 vs. 2025
> Forecasts: Number of RPAS units in service
> Forecasts: Market value of civil and commercial RPAS market

INDUSTRY STRUCTURE AND REGULATION
> Commercial RPAS value chain
> Positioning of market players
> Manufacturers
> Payload providers
> Data service providers
> RPAS operators
> Types of civil and commercial end users
> Evolution of market structure and consolidation
> Business model
> Policy and regulation – global overview
> Policy and regulation for leading commercial RPAS countries

VERTICAL MARKET FOCUS
Vertical markets include:
> Agriculture & forestry
> Civil protection & disaster management
> Engineering & transportation infrastructure
> Oil & energy
> Video & cinema

REGIONAL ANALYSIS
Regions include:
> North America
> Europe
> Asia Pacific

Each vertical market includes:
> Market overview
> RPAS market dynamics
> Key application areas and clients
> Selected case studies
> Drivers and inhibitors
> Forecasts

Each regional analysis includes:
> Market overview
> Selected country focuses
> Selected drivers and forecasts
01 | TYPOLOGY, MARKET OVERVIEW & FORECASTS

WORLD MAP OF RPAS IN SERVICE BY COUNTRY (2015)

RPAS UNITS USED: CURRENT MARKET & RECENT DYNAMICS
- Number of RPAS units used per market segment
- Average number of RPAS per operator (2013-2015)
- Number of operators with RPAS licenses for leading RPAS countries
- Average number of categories of operations for U.S. operators

PRICING OF RPAS SERVICES & EQUIPMENT
- Pricing model by type of application using RPAS
- Average price/day in US$ for operation of RPAS by vertical market
- Average value generated per RPAS per year (2015-2025)
- Average price of RPAS equipment per vertical market (2015)

MARKET VALUE & FINANCIAL PERFORMANCE OF RPAS INDUSTRY
- Market value per vertical market
- Manufacturing revenues per market segment
- Company revenue of U.S. operators with FAA license
- Company structure of operators in U.S.

FORECASTS: NUMBER OF RPAS UNITS IN SERVICE
- Number of RPAS units by region
- Number of RPAS units by market segment
- Share of RPAS units used by market (2015)
- Share of RPAS units used by market (2025)

FORECASTS: MARKET VALUE OF CIVIL & COMMERCIAL RPAS MARKET
- Market value by region
- Market value by vertical market
- Revenues from outsourced services by vertical market
- Manufacturing revenues

02 | INDUSTRY STRUCTURE & REGULATION

COMMERCIAL RPAS VALUE CHAIN

COMMERCIAL DRONE APPLICATIONS IN USA
- Top 10 applications in U.S.
- Other applications in U.S.

POLICY & REGULATION – GLOBAL OVERVIEW
- National regulations for RPAS operations

03 | VERTICAL MARKET FOCUS

AGRICULTURE & FORESTRY – MARKET OVERVIEW
- Agricultural land by region
- Area of forests by region
- Share of farms worldwide, by land size class
- Number of agricultural holdings (world)

AGRICULTURE & FORESTRY – RPAS MARKET DYNAMICS
- RPAS units used for agriculture
- Manufacturing & market value (world)
- Usage of RPAS in number of days (world)
- Example of service delivery workflow in agriculture
AGRICULTURE & FORESTRY - FORECASTS
- RPAS UNITS BY REGION (2013-2025)
- MANUFACTURING REVENUES (2013-2025)
- MARKET VALUE BY REGION (2013-2025)
- USAGE OF RPAS IN NUMBER OF DAYS (2013-2025)

CIVIL PROTECTION & DISASTER MANAGEMENT – MARKET OVERVIEW
- NUMBER OF POLICE OFFICERS (WORLD, 2010, 2015, 2020, 2025)
- NUMBER OF FIRE STATIONS (WORLD, 2010, 2015, 2020, 2025)
- NATURAL DISASTER RISK AREA & U.N. PEACEKEEPING MISSIONS

CIVIL PROTECTION & DISASTER MANAGEMENT – RPAS MARKET DYNAMICS
- RPAS UNITS USED FOR CIVIL PROTECTION & DISASTER MANAGEMENT
- MARKET VALUE & OUTSOURCED REVENUES (WORLD)
- USAGE OF RPAS IN NUMBER OF DAYS (WORLD)
- RPAS PRICING & ENDURANCE

CIVIL PROTECTION & DISASTER MANAGEMENT - FORECASTS
- RPAS UNITS BY REGION (2013-2025)
- MANUFACTURING REVENUES (2013-2025)
- MARKET VALUE & REVENUES FROM OUTSOURCED ACTIVITIES (2013-2025)
- USAGE OF RPAS IN NUMBER OF DAYS (2013-2025)

ENGINEERING & TRANSPORTATION INFRASTRUCTURE– MARKET OVERVIEW
- RAILWAYS IN KM (2010-2015)
- NUMBER OF PORTS & AIRPORTS (WORLD, 2015)
- NUMBER OF DAMS (WORLD)
- NUMBER OF BTS TOWERS (2010-2015)

ENGINEERING & TRANSPORTATION INFRASTRUCTURE – RPAS MARKET DYNAMICS
- RPAS UNITS USED FOR ENGINEERING & TRANSPORTATION
- MANUFACTURING REVENUES & MARKET VALUE ((WORLD)
- USAGE OF RPAS IN NUMBER OF DAYS (WORLD)
- COMPARISON OF DAILY FEES FOR RPAS VS. OTHER INSPECTION VEHICLES

ENGINEERING & TRANSPORTATION INFRASTRUCTURE – FORECASTS
- RPAS UNITS BY REGION (2013-2025)
- MANUFACTURING REVENUES (2013-2025)
- MARKET VALUE & REVENUES FROM OUTSOURCED ACTIVITIES (2013-2025)
- USAGE OF RPAS IN NUMBER OF DAYS (2013-2025)

OIL & ENERGY – MARKET OVERVIEW
- OIL & GAS TOTAL REVENUE IN 2015
- ACTIVE PIPELINES (K.KM)
- KEY INFRASTRUCTURES IN OIL & ENERGY IRM MARKET
- EXAMPLE: OFFSHORE OIL & GAS PRODUCTION COST SEGMENT IN NORWAY

OIL & ENERGY – RPAS MARKET DYNAMICS
- RPAS UNITS USED FOR OIL & ENERGY
- MANUFACTURING REVENUE & MARKET VALUE (WORLD)
- USAGE OF RPAS IN NUMBER OF DAYS (WORLD)
- EXAMPLE OF FACILITY INSPECTION RISK & COST

OIL & ENERGY – FORECASTS
- RPAS UNITS BY REGION (2013-2025)
- MANUFACTURING REVENUES (2013-2025)
- MARKET VALUE & REVENUES FROM OUTSOURCED ACTIVITIES (2013-2025)
- USAGE OF RPAS IN NUMBER OF DAYS (2013-2025)
03\ VERTICAL MARKET FOCUS (CONTINUED)

VIDEO & CINEMA – MARKET OVERVIEW
- MOVIES PRODUCED PER YEAR (2010-2015)
- TV CHANNELS BY THEME (WORLD, 2015)
- VIDEO PRODUCTION COMPANIES (WORLD)
- COMPARISON OF DAILY PRODUCTION FEES FOR A RPAS VS. A HELICOPTER

VIDEO & CINEMA – RPAS MARKET DYNAMICS
- RPAS UNITS USED FOR VIDEO & CINEMA SERVICES
- MANUFACTURING REVENUES & MARKET VALUE (WORLD)
- USAGE OF RPAS IN NUMBER OF DAYS (WORLD)
- RPAS USED IN VIDEO MARKET (SHARE BY MANUFACTURER – 4Q2015)

VIDEO & CINEMA - FORECASTS
- RPAS UNITS BY REGION (2013-2025)
- MANUFACTURING REVENUES (2013-2025)
- MARKET VALUE & REVENUES FROM OUTSOURCED ACTIVITIES (2013-2025)
- USAGE OF RPAS IN NUMBER OF DAYS (2013-2025)

04\ REGIONAL ANALYSIS

NORTH AMERICA – MARKET OVERVIEW
- NUMBER OF RPAS USED BY VERTICAL MARKET
- MANUFACTURING REVENUES & MARKET VALUE
- TOP PLATFORM MANUFACTURERS OF RPAS IN SERVICE IN THE U.S. (1Q2016)
- RPAS BY TYPE OF AIRFRAME IN THE U.S.

NORTH AMERICA – SELECTED COUNTRY FOCUSES
- NUMBER OF FAA EXEMPTIONS PER STATE, MAY 2016
- NUMBER OF FAA EXEMPTIONS IN THE U.S.
- NUMBER OF RPAS LICENSES IN CANADA

NORTH AMERICA – SELECTED DRIVERS & FORECASTS
- NUMBER OF RPAS USED BY VERTICAL MARKET
- MARKET VALUE & SHARE OF OUTSOURCED ACTIVITIES
- REVENUES FROM OUTSOURCED SERVICES BY VERTICAL MARKET
- MANUFACTURING REVENUES

EUROPE – MARKET OVERVIEW
- NUMBER OF RPAS USED BY VERTICAL MARKET
- MANUFACTURING REVENUES & MARKET VALUE

EUROPE – SELECTED COUNTRY FOCUSES
- RPAS BY MASS
- NUMBER OF RPAS & OPERATORS
- RPAS IMPORTS BY COUNTRY

EUROPE – SELECTED DRIVERS & FORECASTS
- NUMBER OF RPAS USED BY VERTICAL MARKET
- MARKET VALUE & SHARE OF OUTSOURCED ACTIVITIES
- REVENUES FROM OUTSOURCED SERVICES BY VERTICAL MARKET
- MANUFACTURING REVENUES

ASIA PACIFIC – MARKET OVERVIEW
- RPAS UNITS IN SERVICE IN ASIA PACIFIC
- MANUFACTURING & OPERATION REVENUE IN ASIA PACIFIC

ASIA PACIFIC – SELECTED COUNTRY FOCUSES
- RPAS OPERATOR CERTIFICATE HOLDERS PER APPLICATION IN AUSTRALIA

ASIA PACIFIC – SELECTED DRIVERS & FORECASTS
- NUMBER OF RPAS USED BY VERTICAL MARKET
- MARKET VALUE & SHARE OF OUTSOURCED ACTIVITIES
- REVENUES FROM OUTSOURCED SERVICES BY VERTICAL MARKET
- MANUFACTURING REVENUES
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