

PROSPECTS FOR REMOTELY PILOTED AIRCRAFT SYSTEMS

2016 Edition | A Euroconsult Executive Report

A vertical market analysis of major drivers, key issues and demand take-up.

- ✓ **80 pages, over 140 graphs & tables**
- ✓ **Interviews with 20 stakeholders across the global value chain**
- ✓ **Comprehensive digital files**
- ✓ **Price starting at € 4,000**

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.

ABOUT PROSPECTS FOR REMOTELY PILOTED AIRCRAFT SYSTEMS

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

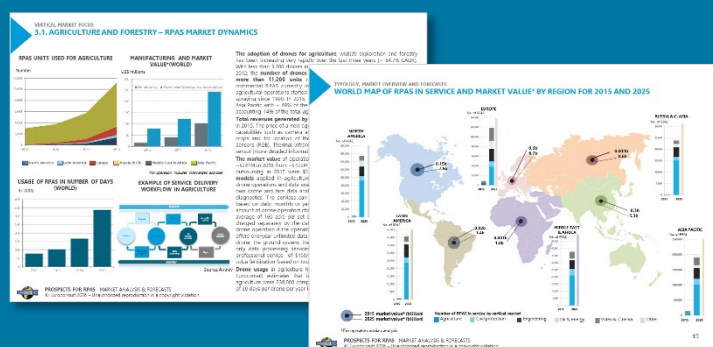
- Commercial RPAS value chain
- Positioning of market players
- Evolution of market structure & consolidation
- Policy & regulation: Global overview

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

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VERTICAL MARKET FOCUS

Vertical markets include:

- > Agriculture & forestry
- > Civil protection & disaster management
- > Engineering & transportation infrastructure
- > Oil & energy
- > Video & cinema

Each vertical market includes:

- > Market overview
- > RPAS market dynamics
- > Key application areas and clients
- > Selected case studies
- > Drivers and inhibitors
- > Forecasts

REGIONAL ANALYSIS

Regions include:

- > North America
- > Europe
- > Asia Pacific

Each regional analysis includes:

- > Market overview
- > Selected country focuses
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