

The Market for UAV Reconnaissance Systems 2019-2028



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As an added benefit, the Complete Data Package is neatly presented in an elegant zipper case that is ideally suited for executive presentations.

Analysis 1

The Market for UAV Reconnaissance Systems 2019-2028

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The Market for UAV Reconnaissance Systems

Executive Summary

The unmanned aircraft system (UAS) market has seen a remarkable transformation over the last 17 years. This radical change occurred in the wake of the 9/11 terrorist attacks and the subsequent global war on terror launched by the United States and its allies.

Operation Enduring Freedom (OEF) began on October 7, 2001. Even before the first U.S. soldier set foot in the country in 2001, unmanned aerial vehicles were in operation over Afghanistan. Long viewed as useful assets for collecting intelligence, UAVs quickly became an indispensable element of U.S. military operations. In some cases, UAVs became combatants, firing air-to-surface missiles at targets of opportunity.

Game of Drones

The fighting in Iraq also brought the first wide-scale use of man-portable unmanned air vehicles. Platoon and company-level commanders use these systems to provide soldiers with better situational awareness.

The U.S.-led invasion of Iraq, as well as military operations in Afghanistan, has helped to raise the profile of UAVs to heights previously undreamed of. Around the world, planned funding for UAVs has skyrocketed since 2001.

Military Market Segment

<u>Company</u>	<u>% Share</u>	<u>Main System</u>
Northrop Grumman	20.693	\$7,208
AVIC	15.208	\$5,297
General Atomics	11.791	\$4,107
IAI	4.004	\$1,395
Airbus	1.849	\$644
Boeing	1.605	\$559
All Others	44.850	\$15,620
Total	100.000	\$38,830

Initially, U.S. and Israeli companies dominated the military market segment. These companies remain leading providers, but this lead is beginning to narrow as more nations aggressively pursue UAVs. China is investing heavily in UAVs and rapidly increasing its annual production rate. Although Beijing is winning some export orders, the majority of the systems built will go directly to the Chinese military.

Meanwhile, the success of UAVs in military operations spurred interest among police agencies. Border patrol was the first "civilian" application for UAVs, but other uses include scientific research and land management surveying. Although civilian government agencies are

studying a number of potential uses of UAVs, the quantities involved are not as lucrative when compared to their military counterparts.

Non-Military Market Segment

<u>Company</u>	<u>% Share</u>	<u>Main System</u>
DJI	76.110	\$29.679
Parrot	20.868	\$8.138
All Others	3.022	\$1.179
Total	100.000	\$38.996

In the market for non-military uses of UAVs, the hobbyist sector is seeing the most growth. Improvements in technology and miniaturization enable average customers to acquire their own UAVs. These systems are relatively simple with limited capability, but the number of uses is increasing almost exponentially.

DJI in China and Parrot in France are the leading suppliers of hobbyist UAVs (3D Robotics in the United States has left the air vehicle market). Unmanned air vehicles built by these companies are also finding uses among surveyors, realtors, moviemakers and farmers. The largest non-military application for UAVs could be agricultural use.

Conclusion. The market for unmanned air vehicles used by militaries will be worth an estimated \$34.8 billion over the next 10 years. This figure includes production of all air vehicles, ground control equipment, and payloads through 2027. Research and development will account for a further \$32.89 billion in spending, and perhaps another \$2.4 billion to \$3.5 billion will go toward UAV service contracts. This equates to a total market value of \$71.19 billion.

During this period, the military market segment will experience a steady increase in value on an annual basis, even as the number of air vehicles built fluctuates. The U.S. market will experience a cooling and eventually settle at a lower level of activity – but one that is still far higher than it was prior to 2001. The market will also see a growing number of UAVs enter production in countries outside of North America, Europe and Israel.

The civilian and commercial segments of this market are worth \$38.996 billion. Hobbyists will account for the vast majority of the systems purchased. Systems manufactured by DJI and Parrot for hobbyists will also see use by police and other civilian agencies, as indicated above.

* * *

PROGRAMS

The following reports are included in this section: (**Note:** a single report may cover several programs.)

Agricultural UAV
BREVEL
CAMCOPTER
Cargo UAV/K-MAX UAV
Chinese UAVs
DJI UAVs
Eagle Eye/VTOL UAVs
Film Industry UAV
Fire Scout VTUAV
HALE UAVs
Harpy/Harop/Attack Drones
Hermes
Hunter
Hypersonic Drones
Indian UAVs
Inspection UAV
Integrator/ScanEagle/Blackjack
Iranian UAVs
Israeli VTOL UAVs
J/AQM-6
Japanese Unmanned Helicopters
Korean UAV Programs
Mirach Series/HammerHead
MQ-1C Gray Eagle/Sky Warrior
News and Sports Drone
Oil Industry UAV
Parrot UAVs
Pioneer
Police and Border Patrol UAVs
Predator/Reaper
Ranger ADS 95/ADS 15
Raven/Puma/WASP
RQ-3A Darkstar/RQ-170 Sentinel
RQ-4 Global Hawk/MQ-4C Triton
Russian UAV Programs
Searcher/Heron
Shadow 200 TUAV/FTUAS
Skylark/Orbiter
South African UAVs
SPERWER/Patroller
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