



THE FUTURE OF COMMERCIAL & INDUSTRIAL UAVs – 2016

Introducing the 2016 edition of “*The Future of Commercial and Industrial UAVs*”.

Some key questions answered by this report include:

- How is the industry developing?
- What are new potential business applications for UAVs?
- What are the technical demands for fixed-wing, multi-rotor, experimental and alternative design UAVs?
- What new instrumentation and sensors are included on UAVs?
- How will these new capabilities translate to market size and growth?
- What are the market drivers and inhibitors for commercial UAV applications, such as surveying and inspection?
- What service revenues will be generated from UAVs - data analytics, visual data inspections, search and rescue?
- How big is the commercial and industrial UAV market?
- What are the most common UAV types used?
- What aviation regulations are applicable for UAVs around the world?
- How much are they worth now and in five years time?
- Are any particularly countries or regions likely to become a hotbed for commercial UAV success?
- How quickly will the market grow in the next five years?
- Who and what are all the key players doing?

>30
interviews

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“The most comprehensive analysis and critical evaluation of the commercial and industrial UAV market ever undertaken.”

OVERVIEW

Valour Consultancy recently published a holistic appraisal of the present and future use of commercial and industrial UAVs. The study provides a critical evaluation and in-depth analysis of commercial and industrial UAVs, systems, key components and respective markets.

The report covers the current technical status of existing products; examine several likely future developments and make realistic assessments of the future markets for their use. The report breakouts 10 key applications, presenting the number of drones sold and active devices in each area. Furthermore, we have taken one step further in providing service revenues per drone in each application and region.

Finally, an overview of current policies, rules, regulations and certifications around the world that appertain to UAV operation is provided. This chapter also includes an appreciation of the barriers and opportunities facing the use of UAVs in commerce and industry and some discussion of possible solutions for these difficulties and ways to take advantage of the opportunities.

All in all, this report provides a comprehensive overview of the future market of drones for both manufacturers, component suppliers, investors and related service providers interested in the development of this market.

REPORT HIGHLIGHTS

- Number of annual UAV shipments, active UAV, device revenues, and ASPs (2015-2020)
- [By UAV type, sensors, connectivity, application and geographic region](#)
- Service revenues and average drone service revenues per month forecasts out to 2020
- [Revenue, shipment and ASP projections for sensor types](#)
- Comprehensive evaluation of key trends within the market
- [Overview of industry development and company strategies](#)
- Critical appraisal of technical requirements
- [Discussion on new potential areas for commercial UAVs](#)
- 19 countries and regions' aviation and UAV regulations documented
- [18 detailed profiles of key players active in the market](#)
- Discussion on the longer term, 2020-2030

MARKET BREAKDOWN

TOP-LEVEL

- UAV Annual Shipments
- Active UAVs
- Revenues
- ASPs
- Service Revenues

KEY REGIONS

- North America
- Latin America
- Europe
- The Middle East and Africa
- Asia-Pacific

KEY APPLICATIONS

- Asset and Building Inspection
- Land and Mining Surveying
- Media and Entertainment
- Agriculture
- Industrial and Power Plants/Lines
- Delivery and Transportation
- Oil and Gas
- Renewable Energy Assets
- Others

Countries

- USA
- Canada
- UK
- France
- Germany
- China
- India
- Japan
- Rest of the World
- Brazil
- China
- India
- Russia
- South Africa
- Australia
- New Zealand

SENSORS

- Visual
- Thermal
- Hyperspectral
- LiDAR
- Multispectral

EXAMPLE TABLES

Example Table 1 Global Market for Hobbyist/Prosumer and Commercial UAVs by Key Region (2015-2020) Annual Shipments, Revenues - (\$ millions), ASP - (\$)								
		2015	2016	2017	2018	2019	2020	CAGR (15 - 20)
North America	Unit Shipments	100	100	100	100	100	100	5.00%
	Active UAVs	100	100	100	100	100	100	5.00%
	Revenues (\$m)	100	100	100	100	100	100	5.00%
	ASPs (\$)	100	100	100	100	100	100	5.00%
Latin America	Unit Shipments	100	100	100	100	100	100	5.00%
	Active UAVs	100	100	100	100	100	100	5.00%
	Revenues (\$m)	100	100	100	100	100	100	5.00%
	ASPs (\$)	100	100	100	100	100	100	5.00%
Europe	Unit Shipments	100	100	100	100	100	100	5.00%
	Active UAVs	100	100	100	100	100	100	5.00%
	Revenues (\$m)	100	100	100	100	100	100	5.00%
	ASPs (\$)	100	100	100	100	100	100	5.00%
Middle East & Africa	Unit Shipments	100	100	100	100	100	100	5.00%
	Active UAVs	100	100	100	100	100	100	5.00%
	Revenues (\$m)	100	100	100	100	100	100	5.00%
	Unit Shipments	100	100	100	100	100	100	5.00%
Asia-Pacific	Unit Shipments	100	100	100	100	100	100	5.00%
	Active UAVs	100	100	100	100	100	100	5.00%
	Revenues (\$m)	100	100	100	100	100	100	5.00%
	ASPs (\$)	100	100	100	100	100	100	5.00%
Global Unit Shipments		100	100	100	100	100	100	5.00%
Global Active UAVs		100	100	100	100	100	100	5.00%
Global Revenues (\$m)		100	100	100	100	100	100	5.00%
Global ASPs (\$)		100	100	100	100	100	100	5.00%

Source: Valour Consultancy

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Example Table 2 Global Market for Commercial UAVs by Key Application (2015-2020) Annual Shipments - (000s), Revenues - (\$ millions), ASP - (\$)								
		2015	2016	2017	2018	2019	2020	CAGR (15 - 20)
Asset & Building Inspection	Unit Shipments	100	100	100	100	100	100	5.00%
	Active UAVs	100	100	100	100	100	100	5.00%
	Revenues	100	100	100	100	100	100	5.00%
	ASPs (\$)	100	100	100	100	100	100	5.00%
Land & Mining Surveying	Unit Shipments	100	100	100	100	100	100	5.00%
	Active UAVs	100	100	100	100	100	100	5.00%
	Revenues	100	100	100	100	100	100	5.00%
	ASPs (\$)	100	100	100	100	100	100	5.00%
Media & Entertainment	Unit Shipments	100	100	100	100	100	100	5.00%
	Active UAVs	100	100	100	100	100	100	5.00%
	Revenues	100	100	100	100	100	100	5.00%
	ASPs (\$)	100	100	100	100	100	100	5.00%
Agriculture	Unit Shipments	100	100	100	100	100	100	5.00%
	Active UAVs	100	100	100	100	100	100	5.00%
	Revenues	100	100	100	100	100	100	5.00%
	ASPs (\$)	100	100	100	100	100	100	5.00%
Industrial and Power Plants/Lines	Unit Shipments	100	100	100	100	100	100	5.00%
	Active UAVs	100	100	100	100	100	100	5.00%
	Revenues	100	100	100	100	100	100	5.00%
	ASPs (\$)	100	100	100	100	100	100	5.00%
Delivery & Transportation	Unit Shipments	100	100	100	100	100	100	5.00%
	Active UAVs	100	100	100	100	100	100	5.00%
	Revenues	100	100	100	100	100	100	5.00%
	ASPs (\$)	100	100	100	100	100	100	5.00%
Oil & Gas	Unit Shipments	100	100	100	100	100	100	5.00%
	Active UAVs	100	100	100	100	100	100	5.00%
	Revenues	100	100	100	100	100	100	5.00%
	ASPs (\$)	100	100	100	100	100	100	5.00%
Renewable Energy Assets	Unit Shipments	100	100	100	100	100	100	5.00%
	Active UAVs	100	100	100	100	100	100	5.00%
	Revenues	100	100	100	100	100	100	5.00%
	ASPs (\$)	100	100	100	100	100	100	5.00%
Others	Unit Shipments	100	100	100	100	100	100	5.00%
	Active UAVs	100	100	100	100	100	100	5.00%
	Revenues	100	100	100	100	100	100	5.00%
	ASPs (\$)	100	100	100	100	100	100	5.00%
Global Unit Shipments		100	100	100	100	100	100	5.00%
Active UAVs		100	100	100	100	100	100	5.00%
Global Revenues		100	100	100	100	100	100	5.00%
Global ASPs		100	100	100	100	100	100	5.00%

Source: Valour Consultancy

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ABOUT VALOUR CONSULTANCY

Valour Consultancy was formed by three friends and former colleagues in 2012. With over a decade of market research experience on both agency- and client-side between them, the founders wanted to base the company on three core values: **HONESTY**, **TRUST** and **TIME**.

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