Small UAV - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts (2025 - 2030)

Market Report | 2025-04-28 | 110 pages | Mordor Intelligence

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Report description:

The Small UAV Market size is estimated at USD 7.45 billion in 2025, and is expected to reach USD 14.38 billion by 2030, at a CAGR of 14.06% during the forecast period (2025-2030).

The small crewless aerial vehicles (UAVs) market has surged in recent years, driven by their diverse applications in aerial photography, surveillance, agriculture, and delivery services. As technology advances, drones are becoming more affordable, versatile, and easier to operate, making them accessible to a broader audience, including businesses and individuals. The demand for small UAVs is mainly fueled by their expanding roles in commercial and military applications.

Small UAVs are crucial in military operations, especially in reconnaissance, surveillance, and target acquisition. The continuous evolution of next-gen military UAVs suggests a trajectory of accelerated growth. Real-time information is invaluable in military operations, empowering warfighters, commanders, and troops to respond effectively to threats. Consequently, global armed forces are increasingly turning to small UAVs, driving the market's growth.

However, the growth of the civilian drone industry is heavily influenced by government regulations. Many countries have imposed laws restricting where crewless aircraft can operate, often limiting them to a short radius around the operator. For example, in China, where half the airspace is under military control, UAV operations are confined to a smaller area than the United States. The Federal Aviation Administration (FAA) oversees commercial UAV activities in the United States, complemented by state-level regulations for companies using UAVs. Notably, countries with more relaxed regulations have seen a surge in drone adoption, while those with stricter rules have experienced slower growth in the market. Despite these regulatory challenges, ongoing developments and investments in commercial and military sectors are set to propel the small UAV market during the forecast period.

Small UAV Market Trends

The Rotary Wing Segment is Expected to Dominate the Market During the Forecast Period

Rotary-wing SUAVs are engineered for prolonged hovering, making them ideal for search and rescue (SAR) missions, albeit with a more limited coverage area. These SUAVs come in various versions with unique endurance and payload capacities. Unlike their fixed-wing counterparts, rotary-wing drones have the distinct advantages of hovering, vertical take-off and landing capabilities, and swift directional changes.

In the military domain, rotary-wing SUAVs are pivotal for target interception and anti-drone measures. Their vertical take-off and landing prowess allows them to navigate even the most challenging weather and terrains, making them invaluable for tactical missions. Moreover, their agility lends itself well to surveillance and SAR operations. Recognizing these benefits, companies across the world are increasingly investing in heavy-duty, long-range rotary-wing SUAVs specially tailored for intelligence, surveillance, and reconnaissance (ISR) activities. For instance, in September 2023, the Indian Army revealed plans to integrate micro-drones with its main battle tanks (MBTs). These micro-drones, capable of vertical take-offs from the tank's turret, are designed for enemy detection, providing real-time intelligence on their movements. Similarly, in February 2023, BAE Systems and Lockheed Martin Skunk Works tested their Stalker and Indago small uncrewed aerial systems (UAS) on an Amphibious Combat Vehicle Command, Control, Communication, Computers/Uncrewed Aerial Systems (ACV C4/UAS) variant. These UAS have showcased exceptional reconnaissance capabilities, bolstering the US Marine Corps' battle management on the ACV C4/UAS platform.

Major technology and e-commerce players are also delving into rotary-wing SUAVs, foreseeing their potential in revolutionizing logistics. In November 2022, Amazon unveiled a rotary-wing SUAV tailored for last-mile cargo deliveries. By October 2023, Amazon had already expanded these services to the United Kingdom and Italy. With such advancements and investments, the rotary-wing market is poised for significant growth during the forecast period.

North America is Expected to Dominate the Market During the Forecast Period

North America, spearheaded by the United States, is set for robust growth during the forecast period. In a strategic move to counter potential threats, the United States is leading the charge in developing state-of-the-art UAV technologies. These advancements encompass improved onboard tracking and heightened payload capacities. This drive is underscored by the nation's intensified R&D efforts, extensive testing of autonomous UAVs, and the innovation of drone defense technologies. Furthermore, the US Department of Defense (DoD) actively seeks cost-effective innovations to enhance its capabilities, particularly in response to rising tensions with nations like Russia and China. A significant step was taken in April 2023, as the Pentagon rolled out a program to strengthen its autonomous systems, notably UAVs, to counterbalance China's expanding military.

A confluence of factors bolsters the US market's expansion. These include a surge in defense expenditures, a growing trend in small UAV deployment, and an uptick in civilian drone applications. Noteworthy is the approval by US aviation regulators for small UAV flights over civilian zones, even at night. Concurrently, the nation's defense contractors are pushing boundaries, crafting next-gen UAVs that surpass current demands. For instance, in September 2023, Teledyne Flir introduced a technology enabling the autonomous launch and retrieval of multiple drones from military vehicles. Its 'Black Recon' system features a nimble micro-drone, weighing a mere 350 grams, with a flight time of up to 45 minutes. These drones are stored in launch boxes with utility across various platforms, from main battle tanks to infantry fighting vehicles.

Similarly, in January 2022, RTX Corporation showcased the counter-drone capabilities of its 'Coyote Block 2+ drone, emphasizing its prowess in neutralizing aerial threats. This drone, outfitted with advanced tracking and surveillance technologies, gives the

United States a significant tactical advantage. These advancements are poised to drive the region's small drone market.

Small UAV Market Industry Overview

The small UAV market is fragmented, with numerous key players vying for dominance. While stringent safety and regulatory measures in defense and homeland security pose barriers to new entrants, the commercial and civil sector is poised for rapid expansion due to its more open competitive landscape. Key players in this market are AeroVironment Inc., SZ DJI Technology Co. Ltd, Teledyne Technologies Incorporated, THALES, and Lockheed Martin Corporation.

These industry leaders leverage cutting-edge technologies to craft innovative small UAV systems, a strategy that bolsters their market share and attracts a fresh customer base. Product innovation and robust R&D investments are expected to be pivotal for established and emerging players to thrive in this dynamic market.

Additional Benefits:

- The market estimate (ME) sheet in Excel format
- 3 months of analyst support

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