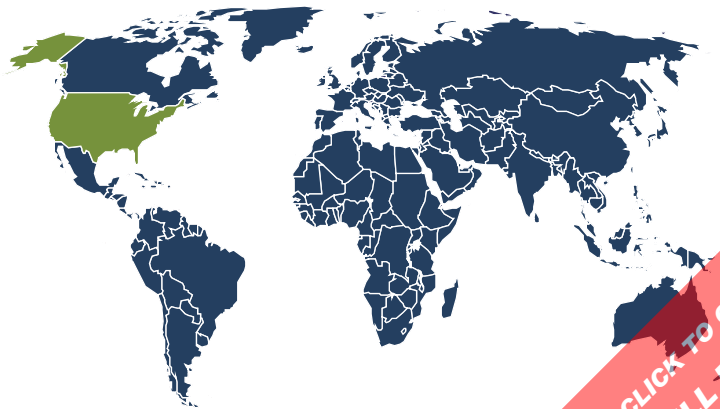




Freedonia Focus Reports
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Drones: United States

June 2016



Highlights

Market Environment

Historical Trends | Key Economic Indicators | Trade | Product Overview
Legal and Regulatory Factors | Technological Trends

Segmentation and Forecasts

Vehicle Method of Lift | Markets

Industry Structure

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ABOUT THIS REPORT

Scope & Method

This report forecasts US drone demand and shipments in US dollars at the manufacturers' level, and demand in units, to 2020. Total demand in both dollars and units is segmented by vehicle method of lift in terms of:

- fixed wing
- rotorcraft
- hybrid and other vehicle methods of lift such as lighter-than-air unmanned aerial vehicles (UAVs).

Encompassed in the scope of this report are UAVs of all sizes, ranging from toy drones that can sit comfortably on the palm of one's hand and weigh less than four ounces to military drones with wingspans of well over 100 feet that weigh more than 16 tons with payload. The terms "drone", "UAS" (unmanned aerial systems), and "UAV" are used interchangeably. In order to avoid double counting, sales of parts and payloads to original equipment manufacturers of drones are not included in the demand figures provided. The government demand figures shown reflect UAV procurement spending and exclude associated research, development, test, and evaluation expenditures. Also excluded are cruise missiles and other unmanned aircraft designed for one-time use, drone services, and separately sold drone software. Missiles and bombs carried as payload on weapon delivery UAVs are excluded as well.

Total demand in dollars is also segmented by market as follows:

- military
- other government markets such as federal agencies and state and local government bodies
- consumer
- commercial.

To illustrate historical trends, total demand in dollars is provided in an annual series from 2005 to 2015; the various segments, total shipments in dollars, and total demand in units are reported at five-year intervals for 2010 and 2015.

This report quantifies trends in various measures of growth. Growth (or decline) expressed as an average annual growth rate (AAGR) is the least squares growth rate, which takes into account all available datapoints over a period. Growth calculated as a compound annual growth rate (CAGR) employs, by definition, only the first and last datapoints over a period. The CAGR is used to describe forecast growth, defined as the expected trend beginning in the base year and ending in the forecast year. Readers are encouraged to consider historical volatility when assessing particular annual values

along the forecast trend, including in the forecast year.

Key macroeconomic indicators are also provided at five-year intervals with CAGRs for the years corresponding to other reported figures. Other various topics, including profiles of pertinent leading suppliers, are covered in this report. A full outline of report items by page is available in the [Table of Contents](#).

Sources

Drones: United States (FF75045) is based on [Drones \(UAVs\)](#), a comprehensive industry study published by The Freedonia Group in June 2016. Reported findings represent the synthesis and analysis of data from various primary, secondary, macroeconomic, and demographic sources including:

- firms participating in the industry, and their suppliers and customers
- government/public agencies
- national, regional, and international non-governmental organizations
- trade associations and their publications
- the business and trade press
- indicator forecasts by The Freedonia Group
- the findings of other industry studies by The Freedonia Group.

Specific sources and additional resources are listed in the [Resources](#) section of this publication for reference and to facilitate further research.

Industry Codes

The topic of this report is related to the following industry codes:

NAICS/SCIAN 2007		SIC	
North American Industry Classification System		Standard Industry Codes	
336411	Aircraft Manufacturing	3728	Aircraft Parts and Auxiliary Equipment, NEC

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 PDF bookmarks are also available for navigation.

RESOURCES

The Freedonia Group

<i>3408 Drones (UAVs)</i> , June 2016	www.freedoniagroup.com
Related Industry Studies	see study contents
<i>3431 Law Enforcement Equipment</i> , July 2016	see study contents
<i>3328 World Magnets</i> , October 2015	see study contents
<i>3321 Electronic Security Products</i> , October 2015	see study contents
<i>3309 World Batteries</i> , July 2015	see study contents
<i>3268 Private Security Services</i> , May 2015	see study contents
<i>3238 Electric Motors</i> , December 2014	see study contents
Related Focus Reports	
<i>Civil Aircraft: United States</i>	see report contents
<i>Motor Vehicles: United States</i>	see report contents
<i>Transport Equipment: United States</i>	see report contents
Freedonia Custom Research	see capabilities

Trade Publications

<i>Aviation Week Network</i>	http://aviationweek.com
<i>Defense News</i>	www.defensenews.com
<i>Inside Unmanned Systems</i>	http://insideunmannedsystems.com
<i>sUAS News</i>	www.suasnews.com
<i>UAS Vision</i>	www.uasvision.com

Agencies & Associations

Academy of Model Aeronautics	www.modelaircraft.org
Association for Unmanned Vehicle Systems International	www.auvsi.org
Center for the Study of the Drone	http://dronecenter.bard.edu
Datamyne	www.datamyne.com
Federal Aviation Administration	www.faa.gov
Missile Technology Control Regime	www.mtcr.info
National Aeronautics and Space Administration	www.nasa.gov
North Atlantic Treaty Organization	www.nato.int
Terapeak	www.terapeak.com
United States Census Bureau	www.census.gov
United States Central Intelligence Agency	www.cia.gov
United States Customs and Border Protection	www.cbp.gov
United States Department of Defense	www.defense.gov
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