

Report Information

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Unmanned Traffic Management (UTM) Market Research Report—Global Forecast till 2032

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Description:

Global Unmanned Traffic Management (UTM) Market Overview

Unmanned Traffic Management (UTM) Market Size was valued at USD 1.1 Billion in 2022. The Unmanned Traffic Management (UTM) Market industry is projected to grow from USD 1.34904 Billion in 2023 to USD 6.903 Billion by 2032, exhibiting a compound annual growth rate (CAGR) of 22.64% during the forecast period (2023 - 2032). Increasing artificial intelligence automation spending and robotic process automation. The key market drivers enhancing the market growth.

Unmanned Traffic Management (UTM) Market

Source Secondary Research, Primary Research, MRFR Database and Analyst Review

Unmanned Traffic Management (UTM) Market Trends

Growing Artificial Intelligence and Automation is driving the market growth

Market CAGR for unmanned traffic management is being driven by the rising number of Artificial Intelligence and Automation. One of the most prominent trends in the UTM market is the integration of artificial intelligence (AI) and automation technologies. AI-based systems enable real-time data analysis, decision-making, and automation of various UTM processes. This integration enhances the efficiency and safety of drone operations by automating tasks such as airspace authorization, collision avoidance, and route optimization. AI-powered UTM systems can analyze large volumes of data from multiple sources, including weather conditions, flight paths, and real-time traffic data, to make informed decisions and manage drone traffic effectively. These systems can identify potential conflicts, reroute drones to avoid congestion, and provide real-time alerts to operators and pilots.

Additionally, trend in the UTM market is the emergence of collaborative ecosystems involving multiple stakeholders, including regulators, drone operators, airspace management authorities, and technology providers. These ecosystems aim to establish standardized protocols, data sharing mechanisms, and cooperation frameworks to ensure seamless integration of drones into the existing airspace. Collaborative UTM ecosystems facilitate the exchange of critical information between stakeholders, enabling real-time coordination and decision-making. For instance, drone operators can share their flight plans with airspace management authorities, who can then provide approval or suggest modifications based on airspace constraints. This collaboration fosters trust, improves situational awareness, and enhances the overall safety and efficiency of UTM operations.

Regulatory advancements and standardization efforts are vital to address the challenges associated with the integration of drones into the airspace and to ensure safe and efficient UTM operations. Governments and regulatory bodies worldwide are actively working on developing regulations and standards specific to UTM. Regulations focus on various aspects, including flight altitudes, airspace restrictions, flight authorization procedures, and drone identification and tracking requirements. These regulations aim to strike a balance between enabling the growth of the drone industry and ensuring safety and security in the airspace.

For instance, the unmanned traffic management market is experiencing significant growth, driven by the integration of AI and automation technologies, the emergence of collaborative UTM ecosystems, and regulatory advancements and standardization efforts. These trends are shaping the future of UTM, enhancing safety, efficiency, and scalability. As the drone industry continues to evolve, it is crucial for stakeholders to stay updated on these trends and adapt their strategies and solutions to effectively navigate the evolving UTM landscape. It drives the Unmanned Traffic Management (UTM) Market revenue.

Unmanned Traffic Management (UTM) Market Segment Insights

Unmanned Traffic Management (UTM) Market Solution Insights

The Unmanned Traffic Management (UTM) Market segmentation, based on solution, includes Communication Infrastructure, Navigation Infrastructure, Surveillance Infrastructure, and Others. The Communication Infrastructure segment dominated the market, accounting for 35% of market revenue (78.48 Billion). Improving drone communication is crucial in all activities to ensure that drone operators have direct control over the aircraft when conducting BVLOS flight operations.

Unmanned Traffic Management (UTM) Market End-User Insights

The Unmanned Traffic Management (UTM) Market segmentation, based on End-User, includes Agriculture & Forestry, Logistics & Transportation, Surveillance & Monitoring, and Others. The logistics & transportation category generated the most income (70.4%). Due to increased drone transportation activities in developed nations. Additionally, the use of small drones to deliver food, emergency medical supplies, and other necessities is growing.

Unmanned Traffic Management (UTM) Market Component Insights

The Unmanned Traffic Management (UTM) Market segmentation, based on Component, includes hardware, software, and services. The software category had a major share in the market. Due to assist pilots in avoiding flying into prohibited zones, it aims to track all UAVs in the air in real-time and display restricted and unrestricted airspaces.

Unmanned Traffic Management (UTM) Market Type Insights

The Unmanned Traffic Management (UTM) Market segmentation, based on type, includes persistent and non-persistent. The persistent was anticipated to hold a prominent market share. Due to the demand for commercial drones for logistics and medical supply transportation services and the need for safe traffic management systems.

Figure1: Unmanned Traffic Management (UTM) Market, by Type, 2022 & 2032 (USD Billion)

Unmanned Traffic Management (UTM) Market, by Type, 2022 & 2032

Source Secondary Research, Primary Research, MRFR Database and Analyst Review

Unmanned Traffic Management (UTM) Market Regional Insights

By region, the study provides the market insights into North America, Europe, Asia-Pacific and Rest of the World. The North American Unmanned Traffic Management (UTM) Market area will dominate this market, due to early adoption and significant investments in UTM infrastructure. The presence of major UAS companies, strong regulatory framework, and extensive research and development activities contribute to market growth. The region also benefits from a robust ecosystem of technology providers, drone operators, and government support. However, challenges such as airspace congestion and regulatory compliance pose hurdles to the market's full potential. Further, the major countries studied in the market report are The US, Canada, Germany, France, the UK, Italy, Spain, China, Japan, India, Australia, South Korea, and Brazil.

Figure2: UNMANNED TRAFFIC MANAGEMENT (UTM) MARKET SHARE BY REGION 2022 (USD Billion)

UNMANNED TRAFFIC MANAGEMENT (UTM) MARKET SHARE BY REGION 2022

Source Secondary Research, Primary Research, MRFR Database and Analyst Review

Europe Unmanned Traffic Management (UTM) Market accounts for the second-largest market share driven by favorable government initiatives, progressive regulations, and active participation of key industry players. The region also benefits from advanced air traffic management infrastructure, extensive testing facilities, and collaborations between research institutions and industry stakeholders. However, the complexity of managing diverse national airspace regulations remains a challenge. Further, the German Unmanned Traffic Management (UTM) Market held the largest market share, and the UK Unmanned Traffic Management (UTM) Market was the fastest growing market in the European region.

The Asia-Pacific Unmanned Traffic Management (UTM) Market is expected to grow at the fastest CAGR from 2023 to 2032. This is driven by government initiatives, supportive regulations, and investments in UAS technology. The region's large population, urbanization, and demand for innovative logistics solutions are major factors driving the market. However, airspace management complexities, privacy concerns, and limited infrastructure in some areas hinder market growth. Moreover, China's Unmanned Traffic Management (UTM) Market held the largest market share, and the Indian Unmanned Traffic Management (UTM) Market was the fastest growing market in the Asia-Pacific region.

Unmanned Traffic Management (UTM) Key Market Players & Competitive Insights

Leading market players are investing heavily in research and development in order to expand their product lines, which will help the Unmanned Traffic Management (UTM) Market grow even more. Market participants are also undertaking a variety of strategic activities to expand their footprint, with important market developments including new product launches, contractual agreements, mergers and acquisitions, higher investments, and collaboration with other organizations. To expand and

survive in a more competitive and rising market climate, Unmanned Traffic Management (UTM) Market industry must offer cost-effective items.

Manufacturing locally to minimize operational costs is one of the key business tactics used by manufacturers in the Unmanned Traffic Management (UTM) Market industry to benefit clients and increase the market sector. In recent years, the Unmanned Traffic Management (UTM) Market industry has offered some of the most significant advantages to medicine. Major players in the Unmanned Traffic Management (UTM) Market, including Leonardo S.P.A. (Italy), Frequentis (Austria), Altitude Angel (UK), L3Harris Technologies Inc. (US), Skyward (US), Lockheed Martin Corporation (US), AirMap Inc. (US), Nova Systems (Australia), Thales Group (France), Unifly (Belgium), and others, are attempting to increase market demand by investing in research and development operations.

Frequentis safety-critical communication and information solutions leverage more than 75 years of experience showcasing true leadership in this market. With deep cross-industry experience in civil aviation, defense, public safety, maritime, and public transportation markets; the company has built upon its initial control Centre voice communications focus to develop deep expertise in these five areas of core competence. The company has driven innovation throughout its history with many industry firsts. This will continue as the industry evolves, with a focus on user-centric design that considers the controller in all it does.

L3Harris Technologies, Inc. is an American technology company, defense contractor, and information technology services provider that produces command and control systems and products, wireless equipment, tactical radios, avionics and electronic systems, night vision equipment, and both terrestrial and spaceborne antennas for use in the government, defense, and commercial sectors. They specialize in surveillance solutions, microwave weaponry, and electronic warfare. It was formed from the merger of L3 Technologies and Harris Corporation on June 29, 2019, and was expected to be the sixth-largest defense contractor in the United States.

Key Companies in the Unmanned Traffic Management (UTM) Market

- Leonardo S.p.A. (Italy)
- Frequentis (Austria)
- Altitude Angel (UK)
- L3Harris Technologies Inc. (US)
- Skyward (US)
- Lockheed Martin Corporation (US)
- AirMap Inc. (US)
- Nova Systems (Australia)
- Thales Group (France)
- Unifly (Belgium)

Unmanned Traffic Management (UTM) Market Industry Developments

For Instance, December 2021 Leonardo Electronics announced it would be building a semiconductor device fabrication facility in Oro Valley, Arizona with construction beginning in the first half of 2022.

For Instance, June 2021 Canada's air navigation service provider NAV CANADA publicly launched the 'NAV Drone' application as part of its national RPAS Traffic Management (RTM) platform supplied by Unifly.

Unmanned Traffic Management (UTM) Market Segmentation

Unmanned Traffic Management (UTM) Market Solution Outlook

- Communication Infrastructure
- Navigation Infrastructure
- Surveillance Infrastructure
- Others

Unmanned Traffic Management (UTM) Market End-User Outlook

- Agriculture & Forestry

- Logistics & Transportation
- Surveillance & Monitoring
- Others

Unmanned Traffic Management (UTM) Market Component Outlook

- Hardware
- Software
- Services

Unmanned Traffic Management (UTM) Market Type Outlook

- Persistent
- Non-Persistent

Unmanned Traffic Management (UTM) Market Regional Outlook

- North America
 - US
 - Canada
- Europe
 - Germany
 - France
 - UK
 - Italy
 - Spain
 - Rest of Europe
- Asia-Pacific
 - China
 - Japan
 - India
 - Australia
 - South Korea
 - Australia
 - Rest of Asia-Pacific
- Rest of the World
 - Middle East
 - Africa
 - Latin America

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