

Quantitative Analysis of the German Drone Market

Berlin, March 2021



I | Drones in Germany

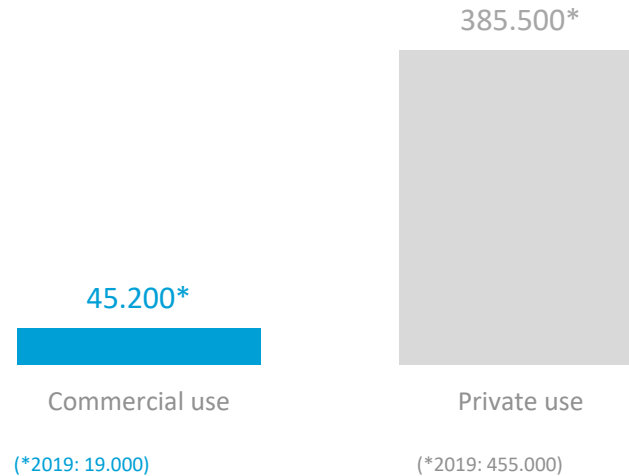
Drones in Germany:

Drones in private and commercial use

430.700 drones in Germany

How many drones are in private and commercial operation?

Private usage: 90 percent
Commercial usage: 10 percent

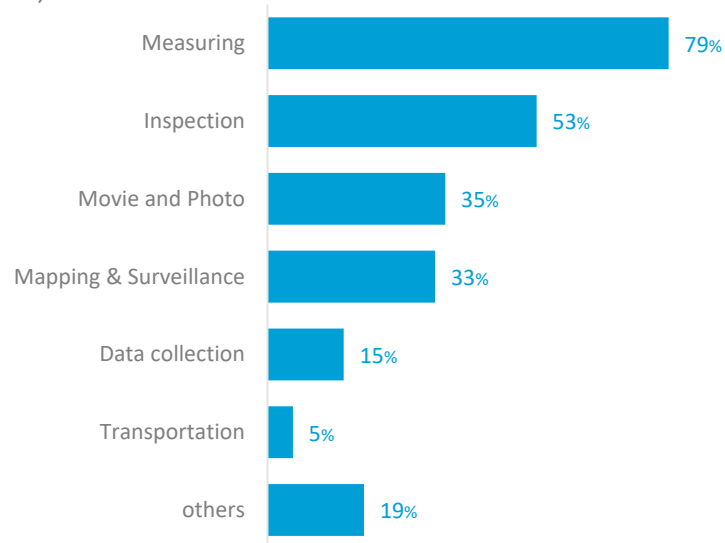


Drones in Germany:

Industrial Use Cases

Survey on industrial use of drones

What applications are drones mostly used for? *(multiple answers possible)*





II | The German Drone Economy

The German Drone Economy:

Drone companies in Germany

Drone companies in Germany

How does the average drone company look like?



Ø employees:
16.9 employees



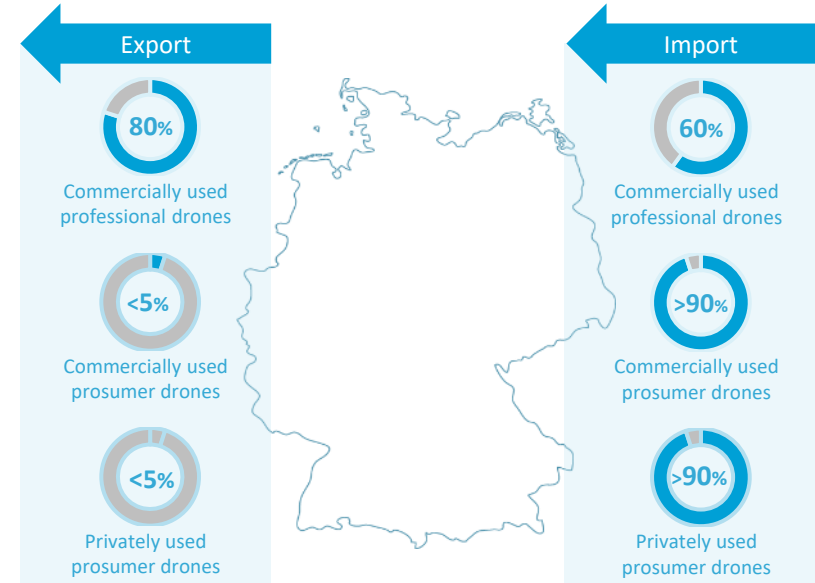
Ø age of the company:
5.6 years



Ø revenue per year:
670,000 Euro

Germany's Import and Export Ratios

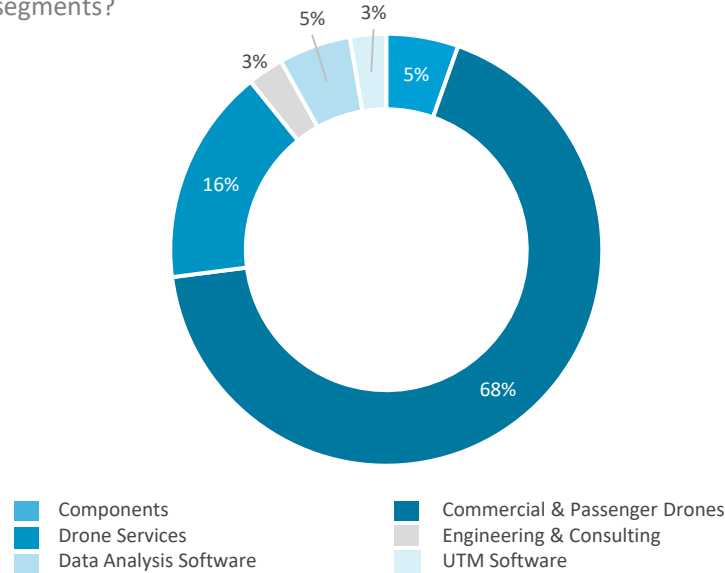
How many drones are imported and exported? (in percent)



The German Drone Economy: Investments

Investments in German drone companies

How is the number of investments distributed among the market segments?

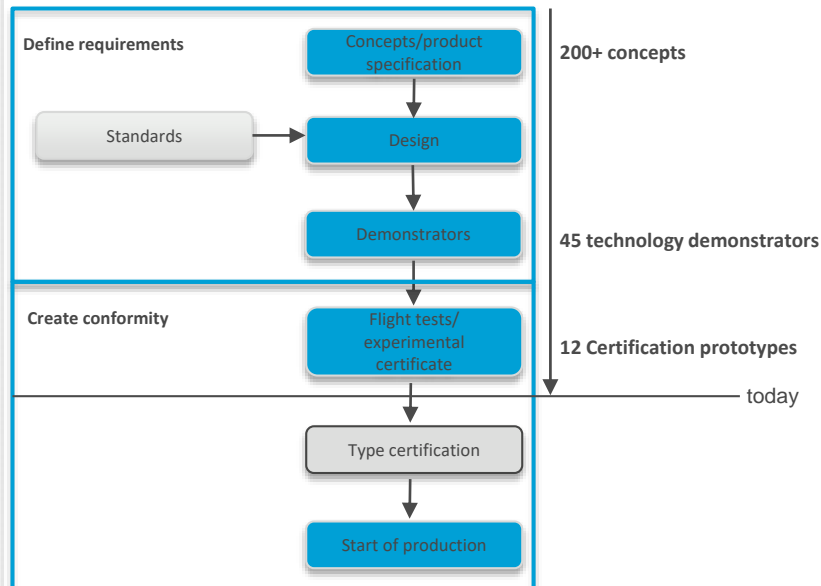


Out of the box: Urban & Regional Air Mobility

The international passenger drone market

The international passenger drone market

What are the requirements?

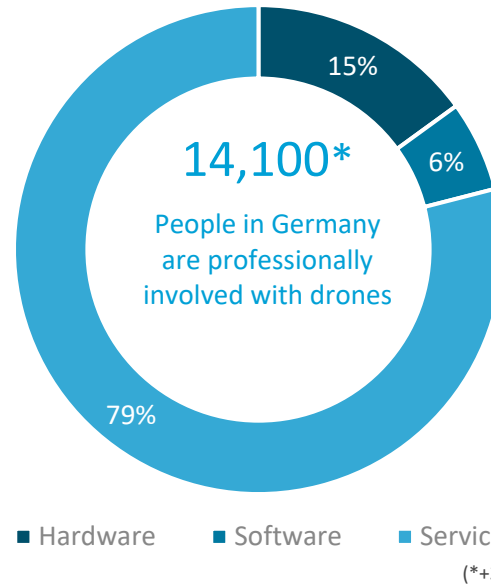


The German Drone Economy:

Employees in the drone economy

Employees in unmanned aviation

How many people are professionally involved with drones?





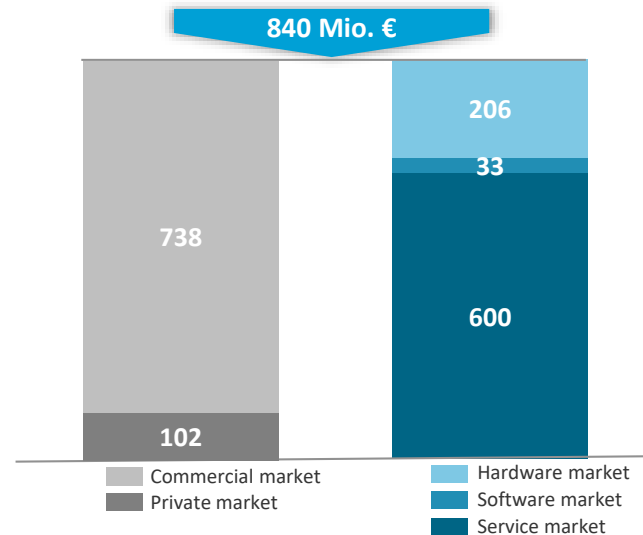
III | The German Drone Market

The German Drone Market:

Market demand in Germany

Size and structure of the German drone market

How high is the market demand in Germany ? (in millions of euros*)



* Difference in totals is due to rounding

The German Drone Market:

European comparison

Commercial market in European comparison

How big is the market demand in European drone markets?

Absolute market size

1. Germany	 +1*
2. France	 -1
3. UK	 -
4. Italy	 +3
5. Switzerland	 -1
6. Spain	 +4
7. Netherlands	 -2
8. Norway	 -2
9. Belgium	 -1
10. Denmark	 -1

Relative market size per worker

1. Norway	 +1*
2. Switzerland	 -1
3. Denmark	 -
4. Ireland	 -
5. Belgium	 +2
6. Finland	 -
7. France	 -2
8. Netherlands	 -
9. UK	 -
10. Germany	 -

(*+/- compared to 2019)










The German Drone Market:

Internationaler comparison


Commercial market in international comparison

What is the market demand in international drone markets?

Absolute market size

1. USA		-*
2. China		-
3. Japan		+4
4. Germany		-
5. France		-2
6. UK		-1
7. Australia		-1
8. Canada		-
9. Italy		-
10. South Korea		-

Relative market size per worker

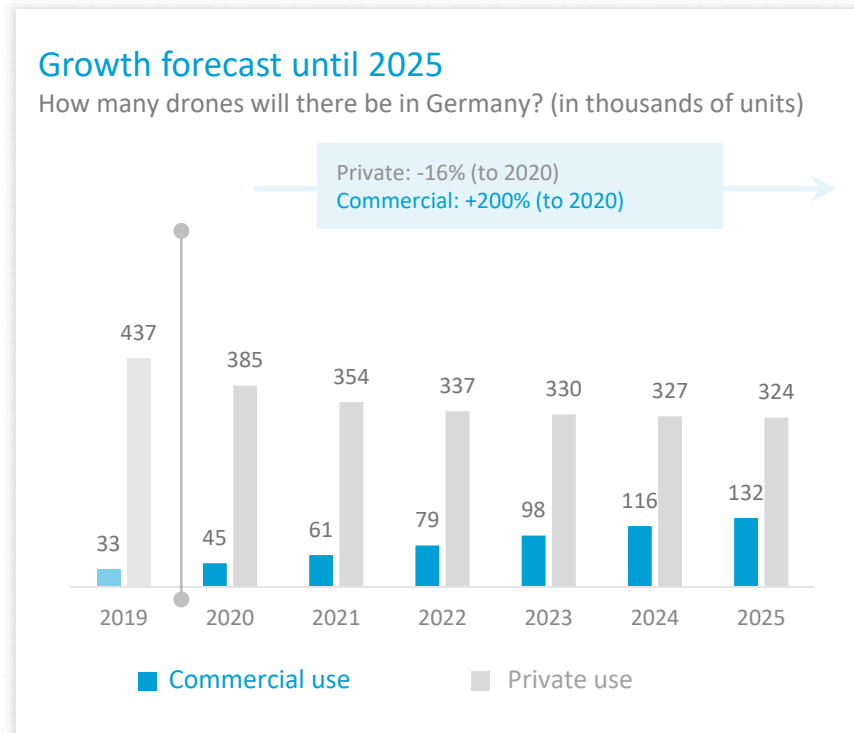
1. Norway		+1*
2. Switzerland		-1
3. Denmark		+4
4. Australia		-
5. USA		-2
6. Israel		-
7. Ireland		+1
8. New Zealand		-3
9. Belgium		+4
10. Singapore		-
17. Germany		-

(*+/- compared to 2019)



IV | Forecast of market development until 2025

Forecast of market development until 2025 : Drones in Germany

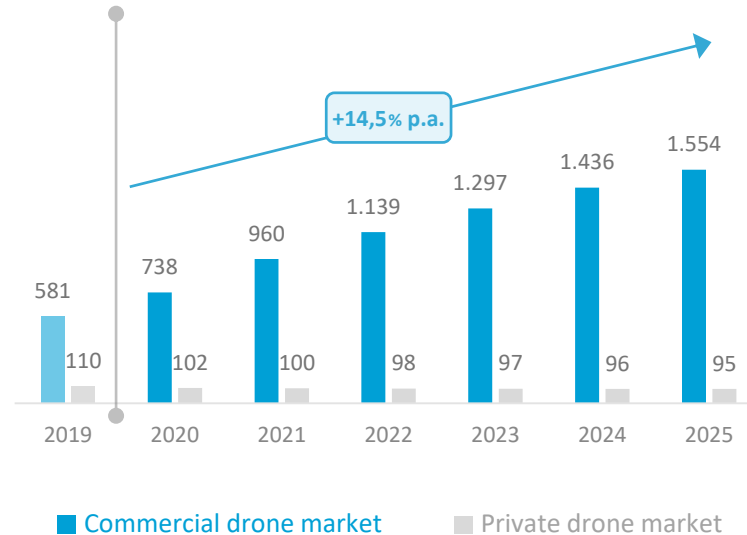


Forecast of market development until 2025 :

Market size and growth

Growth forecast until 2025

How high is the market demand in Germany? (in millions of euros)



In a nutshell:

Key findings at a glance

-  **430,700 drones** are flying in Germany.
-  More and **more people are employed** in the drone market.
-  Air taxis are **technology drivers** for commercial aviation.
-  Germany's drone market is in the **midfield internationally**.
-  The German drone market will **continue to grow**.

Ansprechpartner:

Michael Garvens

Vorsitzender Lenkungsausschuss

Verband Unbemannte Luftfahrt
garvens@verband-unbemannte-luftfahrt.de

Tamara Hartwich

Leiterin Flugbetrieb, Technik und Safety

Bundesverband der Deutschen
Luftverkehrswirtschaft e.V. (BDL)
030- 520077- 170
tamara.hartwich@bdl.aero

Robert Friebe

Referent Digitalisierung, Cybersicherheit, UAV

Bundesverband der Deutschen
Luft- und Raumfahrtindustrie e.V. (BDLI)
030- 206140- 44
friebe@bdli.de

Claudia Nehring

Pressesprecherin, Leiterin Pressearbeit
und Onlinekommunikation

Bundesverband der Deutschen
Luftverkehrswirtschaft e.V. (BDL)
030- 520077- 116
claudia.nehring@bdl.aero

Carmen Gaiser

Presse- und Öffentlichkeitsarbeit

Bundesverband der Deutschen
Luft- und Raumfahrtindustrie e.V. (BDLI)
030- 206140- 15
gaiser@bdli.de