ANEW MARKET DYNAMICS

Market Intelligence | Sustainability Due Diligence | Strategic Research

www.anewmarketdynamics.com

ANMD-MRS18-173

ENVIRONMENTAL MONITORING DRONES

A Global Sustainability Due Diligence and Market Research Study

Shortened Table of Contents

Market Snapshot

US$ 2,200.0m 2025A market value	**US$ 2,507.7m** 2026E market value	**US$ 5,500.0m** 2032F market forecast	**14.0%** CAGR 2025A to 2032F
7 regions Geographic coverage	**18 modules** Country modules	**575 exhibits** Including 114 charts	**217 + 52** Organizations and patent records
2020–2032 Historical data and forecasts		**Global** Regional and country coverage	

Report Facts

Report Attribute	Coverage
Report code	ANMD-MRS18-173 | Environmental AI Applications
Published	September 2026
Study periods	History 2020H to 2024H | Actual 2025A | Estimate 2026E | Forecast 2027F to 2032F
Length	345 pages | 34 chapters | 7 appendices | 575 exhibits including 114 charts
Geography	7 regions | 18 country modules | Residual regional groupings
Segmentation	5 airframe architectures plus payload or sensor, application, end user, business model, operating mode and deployment scale
Directories	217 organizations based in 28 countries | 52 patent records in 10 jurisdictions
Licences	Single-User License (SUL) | Global Corporate License (GCL)

This shortened table of contents presents the chapter architecture, main sections and selected exhibits. The detailed table of contents and sample pages are available to registered users at www.anewmarketdynamics.com.

Register at anewmarketdynamics.com to download detailed table of contents, sample pages and the report prospectus.

The full report is delivered within 24 hours of order confirmation.

https://anewmarketdynamics.com/reports/environmental-monitoring-drones

info@anewmarketdynamics.com samplepages@anewmarketdynamics.com

www.anewmarketdynamics.com

© 2026 Anew Market Dynamics · anewmarketdynamics.com

Part I

Study Framework, Executive Brief and Global Market

Study conventions, headline market findings, methodology and the global and regional analytical foundation.

No.	Chapter, Main Sections and Selected Exhibits	Exhibits	Page
1	**About This Report** Methodology and quality control • Report organization and reader's guide • Reporting conventions • Scope, inclusion and exclusion rules • Primary boundary from airframe and integrated sensing to end of life • Evidence grades and double-count controls	—	1
2	**Executive Market Brief** Key market developments • Market in brief • Market outlook in five statements • Regional and country market outlook • Policy and classification environment • Key findings, risks and stakeholder implications • Industry development timeline **Selected exhibits** *Exhibit 1: Global Environmental-Drone Market Value, 2020H–2032F (Chart) | Exhibit 4: Regional Market Value and CAGR Summary*	6 1 chart	4
3	**Executive Summary and Market Metrics Dashboard** What changed this year • What the market is worth and why • Regional and country opportunity ranking • Policy and classification outlook • Where the risks are • Observed deployment outcome patterns • Topic signal dashboard **Selected exhibits** *Exhibit 7: Market Metrics Dashboard | Exhibit 8: Top Country Opportunity Ranking by 2025A Value*	3	9
4	**Global Market — Dynamics, Size and Outlook** Industry background and configuration families • Industry structure and participant map • Market drivers • Market restraints and challenges • Opportunities and strategic frameworks • Global market size and forecast • Market model conversion logic • Primary boundary and airframe segments **Selected exhibits** *Exhibit 15: Global Value by Airframe Segment, 2020H–2032F (Chart) | Exhibit 20: Airframe Segment Shares, 2025A versus 2032F*	11 1 chart	12
5	**Regional Markets — Seven-region Overview** Regional dashboard • Regional value and share comparison • Regional demand character • Regional opportunity ranking • Regional map of OEM supply, programs, regulation and evidence priority **Selected exhibits** *Exhibit 24: Regional Value, Share and CAGR | Exhibit 26: Regional Demand Character*	7 2 charts	21
6	**How to Read the Country Modules** Module structure and conventions • Full-format and consolidated modules • Data bases and rounding • Country-module data requirements	—	25

Part II

Regional, Country, Segmentation and Demand Analysis

Seven-region coverage, 18 country modules and the market series used to compare value, adoption and demand.

No.	Chapter, Main Sections and Selected Exhibits	Exhibits	Page
7	**North America — Regional Analysis and Country Modules** Regional overview • United States • Canada • Rest of North America • Country comparison **Highlights** *Value, volume and airframe series for the United States and Canada | Policy matrices for FAA Part 107 and Part 108*	53 12 charts	26
8	**Europe — Regional Analysis and Country Modules** Regional overview • Switzerland • France • Germany • United Kingdom • Nordics • Rest of Europe • Country comparison **Highlights** *Value, volume and airframe series for five country modules | Policy matrices for EASA rules and national programs*	116 27 charts	50
9	**Asia Pacific — Regional Analysis and Country Modules** Regional overview • China • India • Japan • Australia • Rest of Asia Pacific • Country comparison **Highlights** *Value, volume and airframe series for China, India, Japan and Australia | Drone Shakti and national programs*	95 22 charts	102

© 2026 Anew Market Dynamics

No.	Chapter, Main Sections and Selected Exhibits	Exhibits	Page
10	**Latin America — Regional Analysis and Country Modules** Regional overview • Brazil • Chile • Rest of Latin America • Country comparison **Highlights** *Value, volume and airframe series for Brazil and Chile | Amazon monitoring and mining-environment programs*	53 12 charts	**144**
11	**Africa — Regional Analysis and Country Modules** Regional overview • Kenya • South Africa • Rwanda • Rest of Africa • Country comparison **Highlights** *Value, volume and airframe series for Kenya, South Africa and Rwanda | Conservation and anti-poaching programs*	74 17 charts	**166**
12	**Middle East — Regional Analysis and Country Modules** Regional overview • Israel • United Arab Emirates • Rest of Middle East • Country comparison **Highlights** *Value, volume and airframe series for Israel and the United Arab Emirates | Methane and sustainability programs*	53 12 charts	**198**
13	**Rest of World — Regional Analysis and Country Modules** Regional overview • Composition and market character • Value and outlook **Selected exhibits** *Exhibit 472: Rest of World Value by Airframe Segment, Panel A: 2020H–2026E (US$ Million) | Exhibit 474: Rest of World Value and Global Share, Panel A: 2020H–2026E (US$ Million / %)*	4	**221**
14	**Global Market Reporting — Master Series and Reference Tables** Global master series • Regional master series • Country reference tables **Selected exhibits** *Exhibit 476: Global Master Value Series, Panel A: 2020H–2026E (US$ Million / %) | Exhibit 482: Country Reference Table — Selected Years (US$ Million)*	9	**223**
15	**Global Segmentation Analysis** Airframe segmentation, the primary market split • Multirotor, fixed-wing, VTOL hybrid, tethered and nano / micro drones • Six secondary overlays by payload, application, buyer, business model, operating mode and deployment scale • Cross-tabulation and additivity rules **Selected exhibits** *Exhibit 485: Global Airframe Segment Value Share, 2025A (Chart) | Exhibit 500: Application Overlay — 2025A and 2032F Allocation*	41 7 charts	**228**
16	**Demand Signals and Forward Indicators** Structural demand signals • BVLOS expansion and sensor-payload integration pipelines • Economic and adoption signals • Indicator dashboard • Leading indicators **Selected exhibits** *Exhibit 526: Forward Indicator Dashboard*	1	**244**
17	**Adjacent-market Enablers** Adjacent enabler landscape and interfaces • Enabling infrastructure and platforms • Financing and service enablers • Battery, semiconductor, sensor, satellite, software and data interfaces **Selected exhibits** *Exhibit 527: Adjacent Enabler Landscape*	1	**246**

Part III

Competition, Engineering, Innovation, Sustainability and Policy

Competitive structure and company profiles alongside technology, sustainability due diligence, supply chains and regulatory frameworks.

No.	Chapter, Main Sections and Selected Exhibits	Exhibits	Page
18	**Competitive Analysis and Company Profiles** Concentration reading • Company profiles across North America, Europe, Asia Pacific, Latin America, Africa and the Middle East • Component, technology and specialist participants • Service and delivery organizations **Selected exhibits** *Exhibit 528: Competitive Structure by Layer | Exhibit 550: Selected Component and Technology Specialists*	24	**248**
19	**Competitive Environment — Structure, Rankings and Matrices** Market structure and concentration reading • Directory-evidence presence rankings • Capability matrices • Competitive outlook • Capability and delivery-footprint benchmark **Selected exhibits** *Exhibit 552: Directory-Evidence Presence — Leading Airframe OEMs (Structural Proxy) | Exhibit 553: Capability Matrix — Leading OEMs*	2	**271**
20	**Mergers, Acquisitions, Partnerships and Industry Network Analysis** M&A record • Partnership and alliance patterns • Industry network reading • Ecosystem network map	—	**273**

© 2026 Anew Market Dynamics

No.	Chapter, Main Sections and Selected Exhibits	Exhibits	Page
21	**Product, Drone Engineering and Innovation** Drone configuration comparison • Standards and design-code frame • Domain and data fit screening • Materials, durability and circularity • Innovation frontier • Emerging and next-generation technology • Cross-technology system analysis **Selected exhibits** *Exhibit 554: Airframe Configuration Comparison | Exhibit 555: Strategic Technology Roadmap to 2035*	2	275
22	**Research, Innovation and Funding Environment** Public research programs • Startup and venture activity • Standards and testing infrastructure • Research, testing, certification and commercialization pipeline **Selected exhibits** *Exhibit 556: Selected Funding and Capital Markets Signals*	1	280
23	**Sustainability Due Diligence, ESG, SDG and Climate Analysis** Carbon, water, biodiversity and circularity • Outcome evidence by application • Double materiality • ESG framework alignment • SDG contribution mapping • Climate risk and adaptation • Anti-greenwashing screen • Social impact and natural capital **Selected exhibits** *Exhibit 557: Sustainability Outcome Evidence by Application | Exhibit 559: Priority SDG Mapping*	3	282
24	**Value Chain, Supply Chain and Geopolitical Analysis** Value-chain map • Material inputs • Components and electronics • Manufacturing and delivery footprints • Trade measures and localization • Logistics and delivery capacity **Selected exhibits** *Exhibit 560: Environmental-Drone Value Chain*	1	297
25	**Policy, Regulation, Legal Structures and Integrated Risk** Airspace, environmental-regulatory and data-policy frameworks • Program architecture by jurisdiction • Standards and certification • Legal structures for delivery • Integrated policy risk reading	—	299

Part IV

Risk, Economics, Implementation and Outlook

Observed outcome patterns, strategic analysis, risk, drone economics, community outcomes, KPIs and the directory framework.

No.	Chapter, Main Sections and Selected Exhibits	Exhibits	Page
26	**Scenario Analysis and Observed Outcome Patterns** Observed outcome patterns from projects and deployments • Long-term outlook ranges to 2035 • Deployment archetypes and drivers • Mission, utilization and endurance threshold analysis **Highlights** *Observed deployments in the United States, Switzerland, Rwanda and India*	2 1 chart	301
27	**Strategic SWOT and TOWS Analysis** SWOT • TOWS strategic options **Selected exhibits** *Exhibit 563: SWOT — Environmental Monitoring Drones | Exhibit 564: TOWS Strategic Options*	2	303
28	**Risk Factors Identified** Integrated risk register • Likelihood-and-impact reading • Mitigants and watch indicators **Selected exhibits** *Exhibit 565: Integrated Risk Register*	1	304
29	**Observed Implementation Patterns by Stakeholder** Manufacturers and providers • Distributors, integrators and installers • End users and buyer organizations • Governments and programs • Financiers and insurers • Buyer and fleet decision criteria	—	305
30	**Community Engagement and Social Inclusion** Access and inclusion models • Flying Labs community drone programs • Gender and labor dimensions • Benefit-sharing patterns • Access, privacy and workforce outcomes	—	306
31	**Pricing, Drone Economics and Financing** Drone cost structure • Buyer economics and payback • Financing context and instruments • Equipment, project, operating and lifecycle economics	—	307
32	**Outlook Synthesis** Where value concentrates to 2032 • What could change the path • Adoption, cost, policy, autonomy and demand threshold events	—	309

© 2026 Anew Market Dynamics

No.	Chapter, Main Sections and Selected Exhibits	Exhibits	Page
33	**Key Performance Indicators** Market KPIs • Sustainability KPIs • Delivery KPIs • Performance KPI library **Selected exhibits** *Exhibit 566: Market KPIs*	1	310
34	**Company and Patent Directories — Overview** Directory method and coverage • Patent register method and coverage • Corporate, technology, project, patent and evidence crosswalk	—	311

Appendices

Reference material, directories and registers supporting the main study.

Coverage	Exhibits	Page
Glossary of Terms and Abbreviations Definitions of terms, units and abbreviations used across the study	1	312
Corporate Directory 217 organizations by region and country with structural role, profile and website	1	313
Patent Directory 52 patent records in 10 jurisdictions, with resolved assignees	2	334
Projects, Policies and Case-Study Register Policy and program register with deployment case studies	2	342
KPI Dictionary and Data Schema KPI definitions, data schema and evidence register	1	343

Register at anewmarketdynamics.com to download detailed table of contents, sample pages and the report prospectus.

The full report is delivered within 24 hours of order confirmation.

https://anewmarketdynamics.com/reports/environmental-monitoring-drones

info@anewmarketdynamics.com samplepages@anewmarketdynamics.com

www.anewmarketdynamics.com