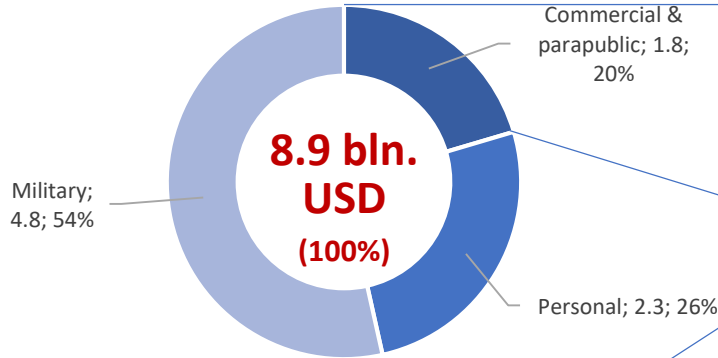


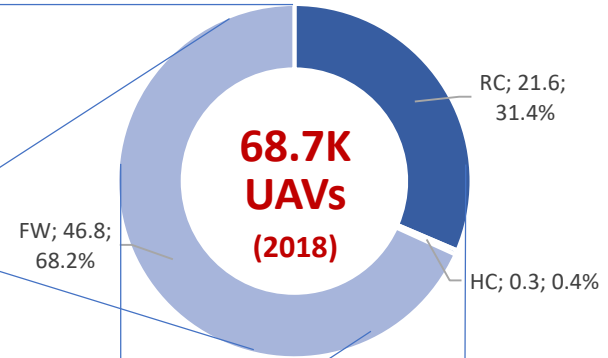


# THE FUTURE OF URBAN AIR MOBILITY

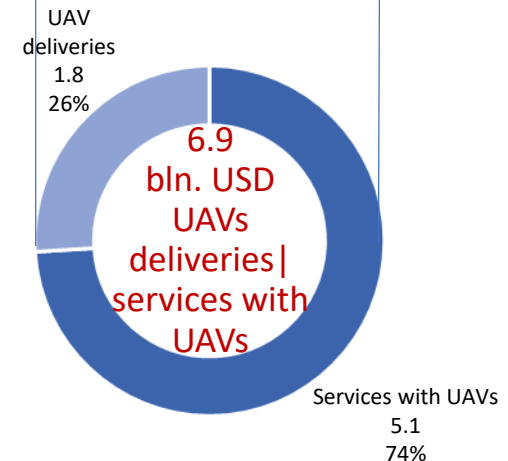
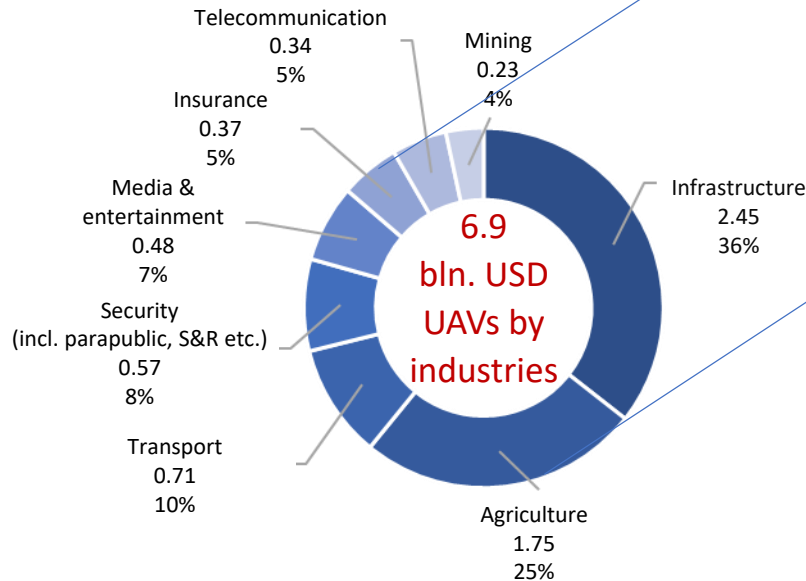
**World UAVs delivery market by major segments in 2018, bln. USD.**



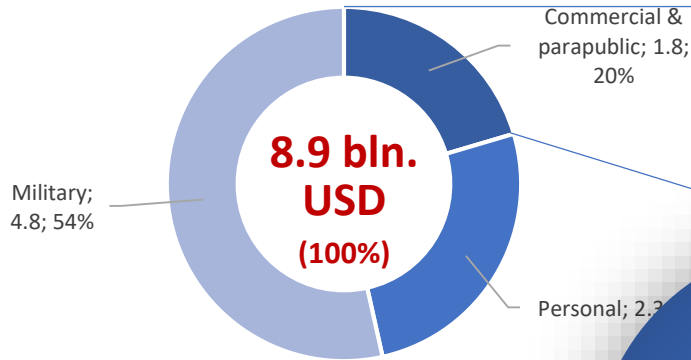
**World UAVs market structure - FW, RC, HC, TILT commercial and parapublic by types**



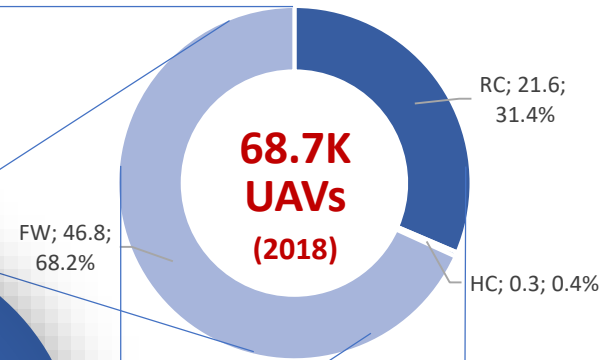
**UAV  
MARKET  
2018**



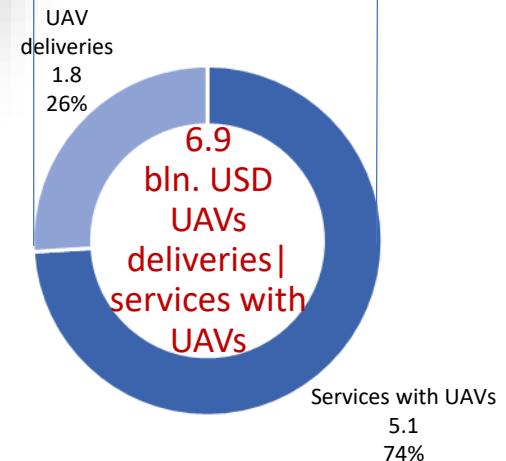
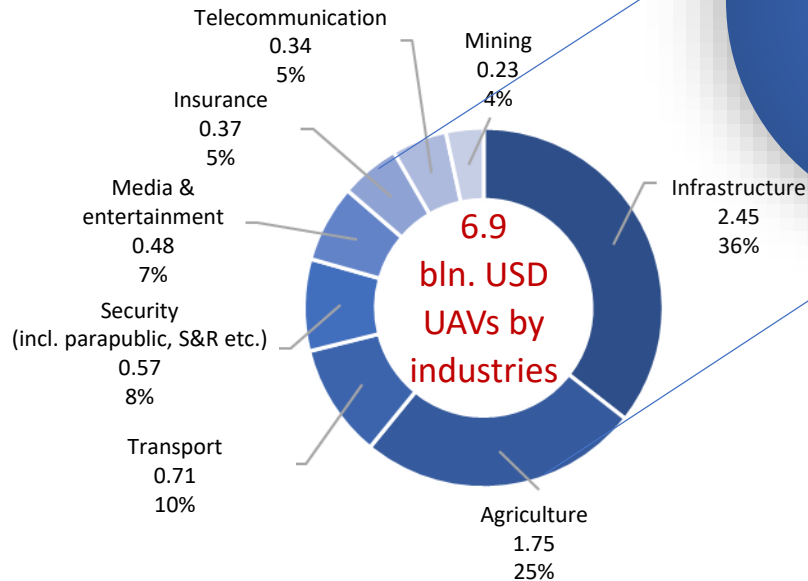
World UAVs delivery market by major segments in 2018, bln. USD.



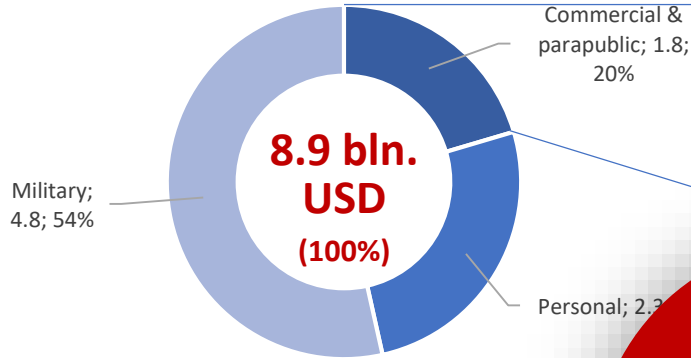
World UAVs market structure - FW, RC, HC, TILT commercial and parapublic by types



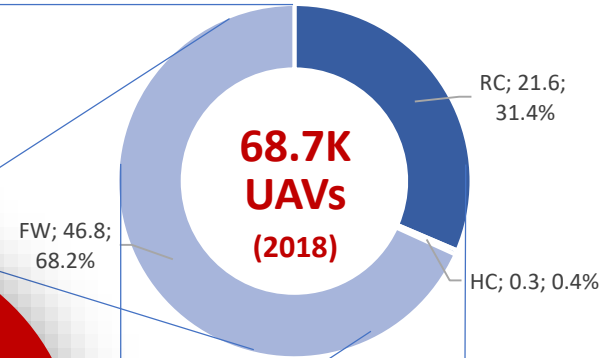
WHAT ABOUT PAX UAVs?



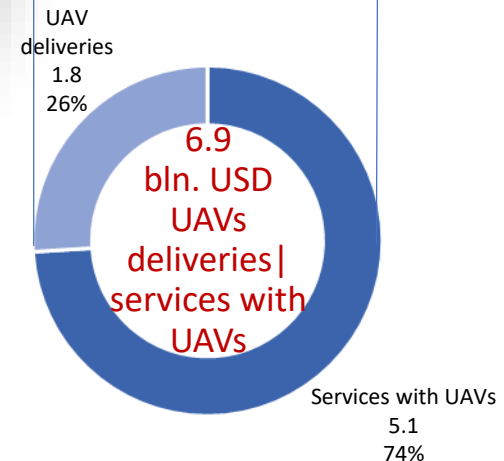
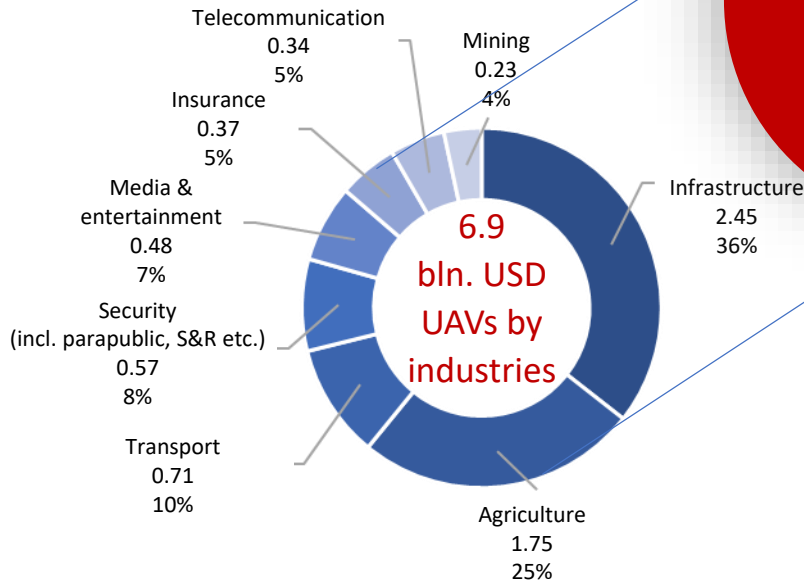
World UAVs delivery market by major segments in 2018, bln. USD.



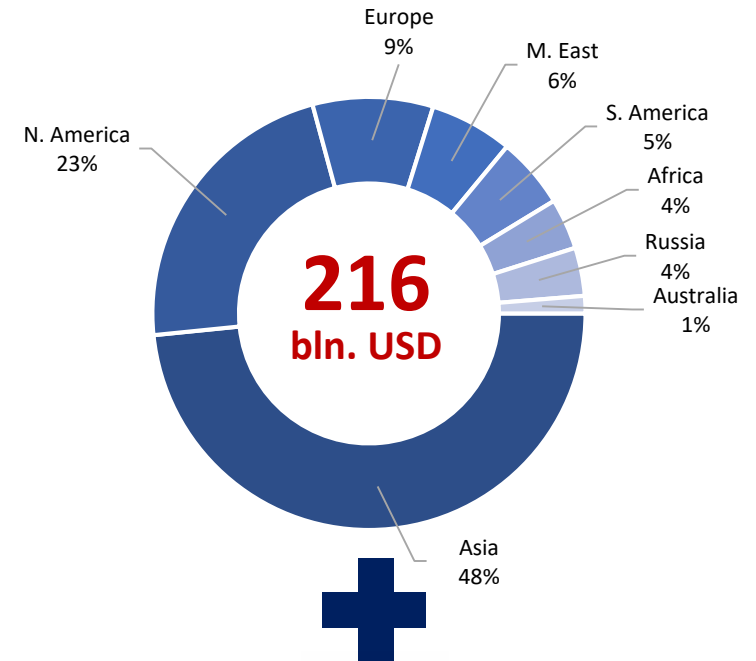
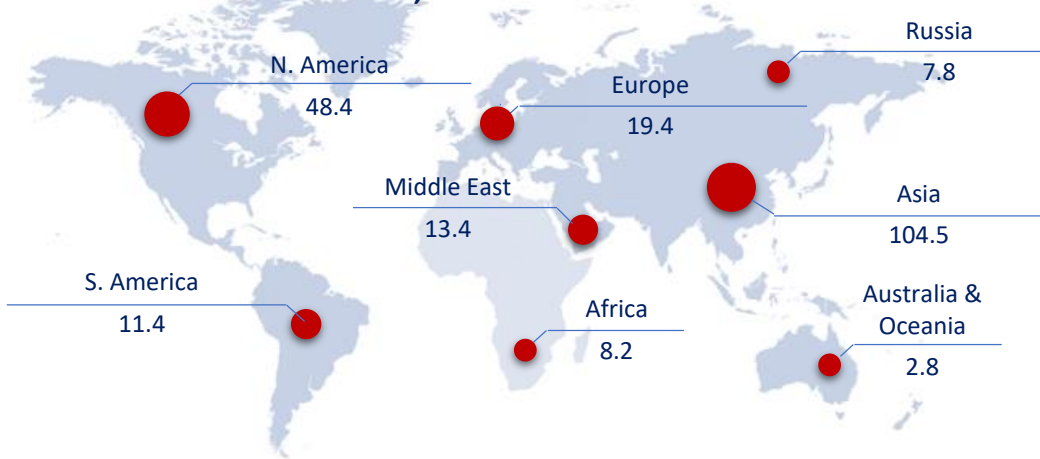
World UAVs market structure - FW, RC, HC, TILT commercial and parapublic by types



**Now we have only test flights of PAX UAVs**



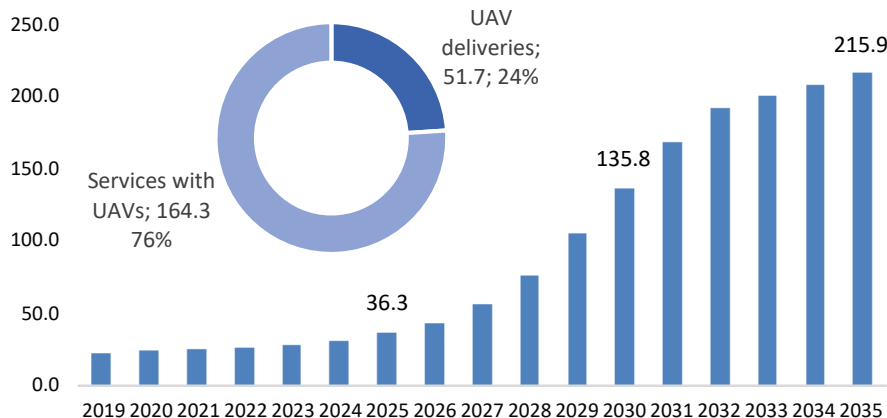
## World commercial and parapublic UAV deliveries and UAV services markets\* in 2035, bln. USD



## The world PAX UAVs market in 2035, bln. USD



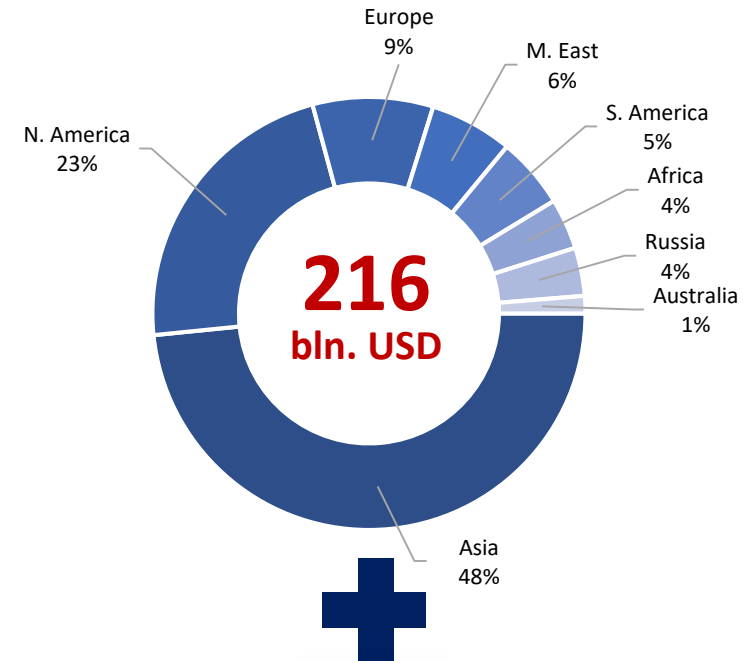
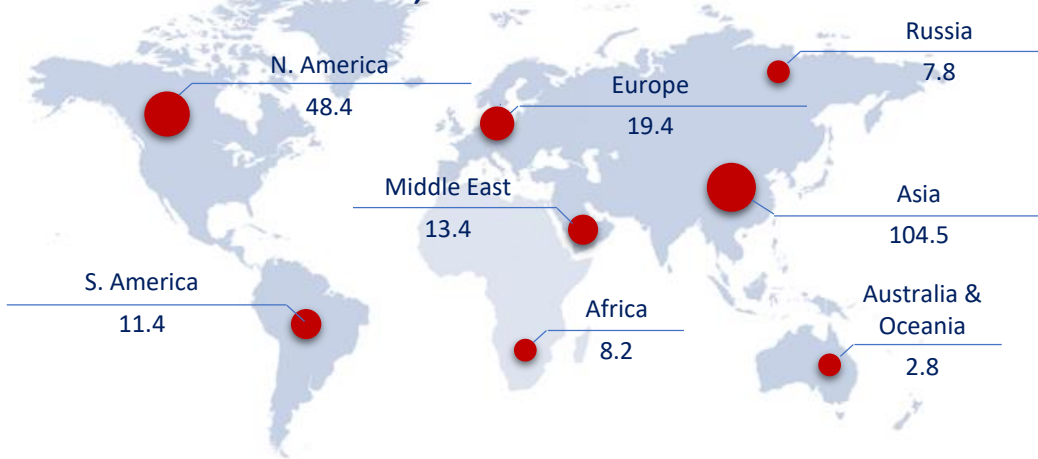
## World UAV deliveries and services markets in commercial and parapublic segments\* in 2019 - 2035, bln. USD



\* Without urban passenger air mobility (UPAM)

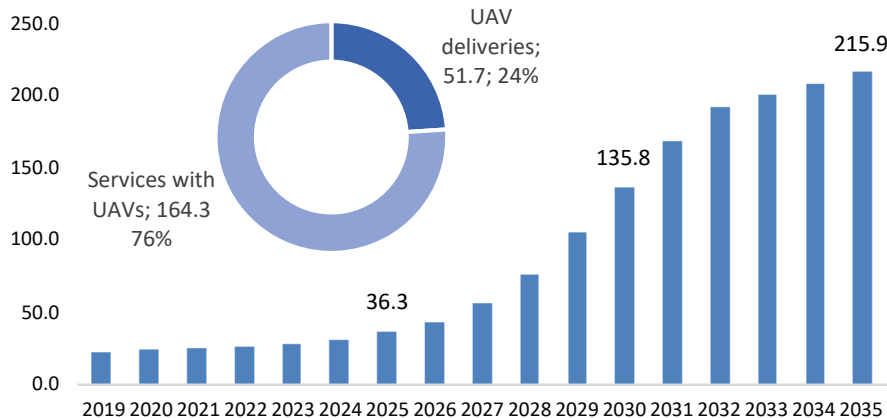
Source: analysis and forecast by Transport Strategy Center (TSC) and AVIACENTER

## World commercial and parapublic UAV deliveries and UAV services markets\* in 2035, bln. USD



The world PAX UAVs market in 2035, bln. USD

## World UAV deliveries and services markets in commercial and parapublic segments\* in 2019 - 2035, bln. USD



\* Without urban passenger air mobility (UPAM)  
Source: analysis and forecast by Transport Strategy Center and AVIACENTER

## The future of air mobility will be defined by

- 1. Megapolises and megacities development.** Cities with a population of more than 8 mln. people, with intensive transport traffic and many traffic jams generate demand for urban air mobility
- 2. Technologies development.** New UTM techs, new eVTOLs, formation of ecosystems of urban air mobility will result in growing demand for air taxi and other types of urban air mobility
- 3. Regulation.** In 2030 in US, EU and other regions and states and in the majority of other countries in 2035 there will be regulatory and technological basis for passenger UAVs to operate in urban areas.

**2030 : 41 megapolises. People of more than 500 cities will suffer severe traffic congestion**



**2028**

Year when world's first **Air Metro** projects will become profitable. (Air Metro is UAV in special air corridors on a regular scheduled principle with predetermined stops, UAVs' capacity 3-6 pax)

**\$30**

Average price of Air Metro ticket for one passenger trip in 2030, declined from USD 50 (in first year of service)

**\$1900**

Average calculated price of air trip for one passenger by **Air Taxi** if there will be helipads of 2.5 minutes pedestrian distance. This makes this segment unprofitable in the horizon 2035 and supposes development of **Air Metro and limited demand for Air Taxi**

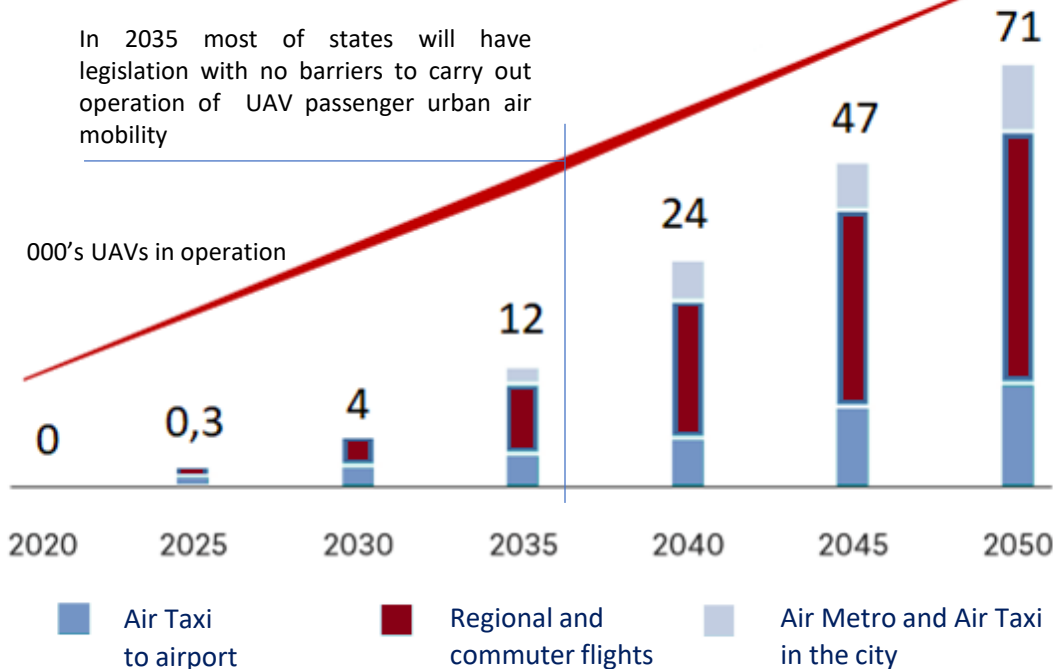
Source: analysis by Transport Strategy Center and AVIACENTER, data of NASA, World Urbanization Prospects

## Forecast of demand for urban passenger air mobility

In 2022 – 2025 market leaders will test the market and ecosystems of urban air mobility to start reliable commercial operations in 2025 – 2035

In accordance to TSC and Aviacenter forecasts the demand for delivery of urban air mobility aircraft will be 12 k in 2035 in different parts of the world

In 2035 most of states will have legislation with no barriers to carry out operation of UAV passenger urban air mobility



150+

Projects of urban air mobility there are realized in the world in 2019

2025

Expected year of start of UTM use in urban areas with regular passenger transportation. Tests of market leaders starting from 2017-2022

12 k  
–  
23 k

Number of UAVs will be operated for regular or charter passenger air services in 2035 globally in urban air mobility in accordance with different forecast scenarios

\$32 bln.

Urban passenger UAVs intracity and intercity air mobility market capacity in 2035

Source: TSC, AVIACENTER, FAA, NASA, SESAR









**DUBAI 2017**



**SINGAPORE 2019**

# Q&A

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