

eVTOL Aircraft Market by Lift Technology, Propulsion Type, System (Batteries & Cells, Electric Motors/Engine, Aerostructures, Avionics, Software), Mode of Operation, Application, Mtow, Range and Region - Global Forecast to 2035

Market Report | 2023-07-25 | 219 pages | MarketsandMarkets

AVAILABLE LICENSES:

- Single User \$4950.00
- Multi User \$6650.00
- Corporate License \$8150.00
- Enterprise Site License \$10000.00

Report description:

The eVTOL Aircraft market is expected to grow from USD 1.2 billion at a CAGR of 52.0% during the forecast period, reaching USD 23.4 billion by 2035. Market expansion is likely to be driven by factors such as the growing need for green energy and noise-free aircraft, increasing demand for alternative modes of transport, and improving technologies.

" Increasing need for an alternative mode of transport. "

The increasing demand for alternative modes of transport is propelling the EVTOL market due to several factors. Firstly, congested urban areas and traffic congestion have created a need for efficient and time-saving transportation solutions. EVTOL aircraft offer the potential for vertical takeoff and landing, bypassing traditional road networks and enabling faster point-to-point travel. Secondly, the growing concerns over environmental sustainability and the need to reduce carbon emissions have intensified the demand for electric-powered transportation. EVTOLs, being electrically driven, align with these sustainability goals. Lastly, the rapid advancements in technology, such as battery efficiency and autonomy, have made EVTOLs more viable and safer, generating increased interest from both consumers and investors in this transformative mode of transportation.

"Based on Application Type, the Cargo Transport segment accounts for the highest growth rate during the forecast period."

Based on application, the eVTOL Aircraft market has been segmented into Air Taxis, Air Shuttles & Air Metro, Private Transport, Cargo Transport, Air Ambulance & Medical Emergency Last Mile Delivery, Inspection & Monitoring, Surveying & Mapping, Spraying & Seeding, & Special Mission. Cargo transport based on the EVTOL application type is experiencing the highest growth rate in the

Scotts International. EU Vat number: PL 6772247784

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

market due to several key reasons. Firstly, there is a rising demand for efficient and fast delivery of goods, driven by the growth of e-commerce and on-demand services. EVTOLs offer the potential for expedited delivery by bypassing traditional ground transportation constraints and congested road networks. Additionally, cargo transport EVTOLs can operate beyond existing infrastructure, enabling direct delivery to remote or challenging-to-reach locations. Furthermore, the higher profit margins associated with cargo transport make it an attractive market segment for investment and innovation. Overall, the combination of speed, flexibility, and profitability positions cargo transport as the leading growth driver in the EVTOL market.

"Based on the Propulsion type, the Hybrid segment is projected to grow at the highest rate during the forecast period." Based on Propulsion Type, the eVTOL Aircraft market has been segmented into fully electric, hybrid, and electric hydrogen. The hybrid mode of propulsion based on the EVTOL propulsion type is experiencing the highest growth rate in the market due to several compelling factors. Firstly, hybrid propulsion combines the benefits of electric power, such as lower emissions and quieter operations, with the extended range and faster refueling capabilities of conventional fuel-based systems. This versatility appeals to a wide range of applications, including longer-distance travel and intercity connections. Secondly, the hybrid approach addresses the limitations of fully electric or conventional propulsion, providing a balanced solution that meets regulatory requirements and operational needs. Lastly, advancements in hybrid propulsion technology, including improved energy storage and power management systems, have enhanced performance and reliability, further driving the adoption and growth of this propulsion type in the EVTOL market.

"Asia Pacific is projected to grow at the highest CAGR during the forecast period."

The APAC region is estimated to account for the highest growth rate in the eVTOL Aircraft market during the forecast period. In this region, the eVTOL Aircraft market has been studied for China, India, Japan, Australia, South Korea, and the Rest of APAC. Countries in the Asia Pacific region are upgrading their capabilities by undergoing developments in the field of eVTOL Aircraft. The region's dense population and expanding urban areas necessitate innovative transportation solutions to combat traffic congestion, making EVTOLs an attractive option with their vertical takeoff and landing capabilities. Secondly, countries like China, Japan, and South Korea have made significant investments in technological advancements and innovation, fostering a conducive environment for EVTOL development. Government support through favorable policies, regulations, and infrastructure development further bolsters the growth prospects of the industry. The region's flourishing e-commerce market and rising middle-class population also drive the demand for expedited deliveries and efficient transportation options, which EVTOLs can provide. Moreover, Asia-Pacific economies increasingly prioritize sustainability and carbon emission reduction, aligning with EVTOLs' electrically powered nature and positioning them as a preferred choice for consumers and governments. With these factors combined, the Asia-Pacific region is well-positioned to witness substantial growth in the EVTOL market as it addresses the pressing transportation challenges, harnesses technological advancements, and embraces sustainability goals.

The break-up of the profile of primary participants in the ultralight and light aircraft market:

- By Company Type: Tier 1 - 49%, Tier 2 - 37%, and Tier 3 - 14%
- By Designation: C Level - 55%, Director Level - 27%, and Others - 18%
- By Region: North America - 45%, Europe - 27%, Asia Pacific -16%, Middle East- 7% Latin America- 3%, Africa- 2%.

Major players operating in the eVTOL Aircraft market are Jaunt Air Mobility (US), Lilium (Germany), Volocopter (Germany), and EHang (China), among others.

Research Coverage:

This research report categorizes the eVTOL Aircraft market basis of Lift Technology (Vectored Thrust, Multicopter, Lift Plus Cruise),

Scotts International. EU Vat number: PL 6772247784

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

By Propulsion Type (Fully Electric, Hybrid, Electric Hydrogen), System (Batteries & Cells, Electric Motors/Engine, Aerostructures, Avionics, Software, Others (Actuators, Distribution Devices)), Mode of Operation (Piloted, Autonomous), Application (Air Taxis, Air Shuttles & Air Metro, Private Transport, Cargo Transport, Air Ambulance & Medical Emergency Last Mile Delivery, Inspection & Monitoring, Surveying & Mapping, Spraying & Seeding, Special Mission), MTOW (< 250 Kg, 250 - 1000 Kg, 1000 - 2000 Kg, > 2000 Kg), Range (< 200 Km, > 200 Km) in these segments have been mapped across major Regions (North America, Europe, Asia Pacific, Middle East, Africa & Latin America). The scope of the report covers detailed information regarding the major factors, such as drivers, restraints, challenges, and opportunities, influencing the growth of the eVTOL Aircraft market. A detailed analysis of the key industry players has been done to provide insights into their business overviews; solutions and services; key strategies; agreements, collaborations, new product launches, contracts, expansion, acquisitions, and partnerships associated with the eVTOL Aircraft market. Competitive analysis of upcoming startups in the eVTOL Aircraft market ecosystem is covered in this report.

Reasons to buy this report:

The report will help the market leaders/new entrants in this market with information on the closest approximations of the revenue numbers for the overall eVTOL Aircraft market and the subsegments. This report will help stakeholders understand the competitive landscape and gain more insights to position their businesses better and plan suitable go-to-market strategies. The report also helps stakeholders understand the pulse of the market and provides them with information on key market drivers, restraints, challenges, and opportunities.

The report provides insights on the following pointers:

- Market Penetration: Comprehensive information on eVTOL Aircraft offered by the top players in the market
- Product Development/Innovation: Detailed insights on upcoming technologies, research & development activities, and new product & service launches in the eVTOL Aircraft market
- Market Development: Comprehensive information about lucrative markets - the report analyzes the eVTOL Aircraft market across varied regions
- Market Diversification: Exhaustive information about new products & services, untapped geographies, recent developments, and investments in the eVTOL Aircraft market.
- Competitive Assessment: In-depth assessment of market shares, growth strategies, and service offerings of leading players in the eVTOL Aircraft market.

Table of Contents:

1□INTRODUCTION□	34
1.1□STUDY OBJECTIVES□	34
1.2□MARKET DEFINITION□	34
1.3□MARKET SCOPE□	35
1.3.1□MARKETS COVERED□	35
FIGURE 1□EVTOL AIRCRAFT MARKET SEGMENTATION□	35
1.3.2□YEARS CONSIDERED□	35
1.3.3□REGIONAL SCOPE□	36
1.4□INCLUSIONS AND EXCLUSIONS□	36
TABLE 1□INCLUSIONS AND EXCLUSIONS IN EVTOL AIRCRAFT MARKET□	36
1.5□CURRENCY CONSIDERED□	36

Scotts International. EU Vat number: PL 6772247784

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

1.6	LIMITATIONS	37
1.7	MARKET STAKEHOLDERS	37
1.8	SUMMARY OF CHANGES	38
2	RESEARCH METHODOLOGY	39
2.1	RESEARCH DATA	39
	FIGURE 2	REPORT PROCESS FLOW
	FIGURE 3	RESEARCH DESIGN
2.1.1	SECONDARY DATA	40
2.1.2	PRIMARY DATA	41
2.1.2.1	Key primary sources	41
2.1.2.2	Key primary insights	41
2.2	MARKET SIZE ESTIMATION	42
2.2.1	SEGMENTS AND SUBSEGMENTS	42
2.3	RESEARCH APPROACH AND METHODOLOGY	43
2.3.1	BOTTOM-UP APPROACH	43
2.3.1.1	Market size estimation	43
	FIGURE 4	MARKET SIZE ESTIMATION METHODOLOGY: BOTTOM-UP APPROACH (DEMAND-SIDE)
	FIGURE 5	MARKET SIZE ESTIMATION METHODOLOGY: BOTTOM-UP APPROACH (SUPPLY-SIDE)
2.3.2	TOP-DOWN APPROACH	44
	FIGURE 6	MARKET SIZE ESTIMATION METHODOLOGY: TOP-DOWN APPROACH
2.4	DATA TRIANGULATION AND VALIDATION	45
	FIGURE 7	DATA TRIANGULATION
2.4.1	TRIANGULATION THROUGH PRIMARY AND SECONDARY RESEARCH	46
2.5	GROWTH RATE FACTORS	46
2.6	RISKS	46
2.7	RESEARCH ASSUMPTIONS	46
3	EXECUTIVE SUMMARY	47
	FIGURE 8	BATTERIES AND CELLS TO ACCOUNT FOR LARGEST MARKET SHARE IN 2023
	FIGURE 9	EVTOL AIRCRAFT, BY LIFT TECHNOLOGY, 2023
	FIGURE 10	FULLY ELECTRIC SEGMENT TO DOMINATE MARKET IN 2023
	FIGURE 11	EVTOL AIRCRAFT MARKET IN LATIN AMERICA TO GROW AT HIGHEST CAGR DURING FORECAST PERIOD
4	PREMIUM INSIGHTS	50
4.1	OVERVIEW OF ATTRACTIVE OPPORTUNITIES IN EVTOL AIRCRAFT MARKET	50
	FIGURE 12	GROWING NEED FOR CLEANER AND QUIETER AIRCRAFT TO DRIVE MARKET DURING FORECAST PERIOD
4.2	EVTOL AIRCRAFT MARKET, BY MODE OF OPERATION	50
	FIGURE 13	AUTONOMOUS SEGMENT PROJECTED TO LEAD MARKET FROM 2023 TO 2030
4.3	EVTOL AIRCRAFT MARKET, BY MTOW	51
	FIGURE 14	100-1,000 KG SEGMENT PROJECTED TO HAVE HIGHEST SHARE DURING FORECAST PERIOD
4.4	EVTOL AIRCRAFT MARKET, BY RANGE	51
	FIGURE 15	<=200 KM SEGMENT PROJECTED TO ACCOUNT FOR HIGHEST MARKET SHARE DURING FORECAST PERIOD
4.5	EVTOL AIRCRAFT MARKET, BY TOP COUNTRIES	52
	FIGURE 16	EVTOL AIRCRAFT MARKET IN NETHERLANDS TO GROW AT HIGHEST CAGR DURING FORECAST PERIOD
5	MARKET OVERVIEW	53
5.1	INTRODUCTION	53
5.2	MARKET DYNAMICS	54
	FIGURE 17	EVTOL AIRCRAFT MARKET DYNAMICS
5.2.1	DRIVERS	54

5.2.1.1	Growing need for green energy and noise-free aircraft	54
5.2.1.2	Increasing demand for alternative mode of transport	55
FIGURE 18 GROWING POPULATION ACROSS REGIONS TO INCREASE DEMAND FOR ALTERNATIVE MODE OF TRANSPORTATION		
5.2.1.3	Improving technologies in batteries, motors, and power electronics	56
5.2.2	RESTRAINTS	57
5.2.2.1	Battery failures due to high voltage and thermal issues	57
5.2.2.2	Crash due to software failures	57
5.2.2.3	Certification issues	58
FIGURE 19 EVTOL CERTIFICATION ECOSYSTEM		
5.2.3	OPPORTUNITIES	58
5.2.3.1	Strategic developments	58
5.2.3.2	Upcoming application areas	59
5.2.4	CHALLENGES	59
5.2.4.1	Safety issues	59
5.2.4.2	Lack of regulatory standards	60
5.3	VALUE CHAIN ANALYSIS	60
FIGURE 20 EVTOL AIRCRAFT MARKET: VALUE CHAIN ANALYSIS		
5.3.1	RAW MATERIALS	61
5.3.2	R&D	61
5.3.3	COMPONENT MANUFACTURING	61
5.3.4	OEMS	61
5.3.5	END USERS	61
5.4	EVTOL AIRCRAFT MARKET ECOSYSTEM	61
5.4.1	PROMINENT COMPANIES	61
5.4.2	PRIVATE AND SMALL ENTERPRISES	62
5.4.3	END USERS	62
FIGURE 21 EVTOL AIRCRAFT MARKET ECOSYSTEM		
TABLE 2 EVTOL AIRCRAFT MARKET ECOSYSTEM		
5.5	DISRUPTION IMPACTING CUSTOMER'S BUSINESS	63
FIGURE 22 EVTOL AIRCRAFT MARKET ECOSYSTEM		
5.6	TRADE DATA ANALYSIS	64
5.7	PORTER'S FIVE FORCES ANALYSIS	65
TABLE 3 PORTER'S FIVE FORCES ANALYSIS		
5.7.1	THREAT OF NEW ENTRANTS	66
5.7.2	THREAT OF SUBSTITUTES	66
5.7.3	BARGAINING POWER OF SUPPLIERS	66
5.7.4	BARGAINING POWER OF BUYERS	66
5.7.5	INTENSITY OF COMPETITIVE RIVALRY	66
5.8	AVERAGE SELLING PRICE	67
TABLE 4 AVERAGE SELLING PRICE: EVTOL MARKET, BY LIFT TECHNOLOGY		
5.9	VOLUME ANALYSIS	67
TABLE 5 EVTOL AIRCRAFT MARKET, BY VOLUME, 2020-2022 (USD MILLION)		
TABLE 6 EVTOL AIRCRAFT MARKET, BY VOLUME, 2020-2030 (USD MILLION)		
5.10	TECHNOLOGY ANALYSIS	67
5.10.1	LITHIUM-SULFUR BATTERIES	67
5.10.2	HYDROGEN FUEL CELLS	68
5.11	TARIFF AND REGULATORY LANDSCAPE	68

5.11.1	THE EUROPEAN UNION AVIATION SAFETY AGENCY (EASA) REGULATION	68
5.11.2	FEDERAL AVIATION ADMINISTRATION (FAA) REGULATION	68
5.12	KEY CONFERENCES AND EVENTS, 2023-2024	69
TABLE 7	EVTOL AIRCRAFT MARKET: DETAILED LIST OF CONFERENCES AND EVENTS	69
6	INDUSTRY TRENDS	73
6.1	INTRODUCTION	73
6.2	EMERGING TRENDS	73
6.2.1	ARTIFICIAL INTELLIGENCE (AI)	73
6.2.2	BIG DATA ANALYTICS	74
6.2.3	INTERNET OF THINGS (IOT)	74
6.2.4	CYCLOROTOR EVTOL	75
6.2.5	URBAN AIR MOBILITY	75
6.2.6	ENERGY HARVESTING	75
6.3	CASE STUDIES	76
6.3.1	BETA TECHNOLOGIES DEVELOPED EVTOL AIRCRAFT WITH MICROSTRAIN SENSORS BY PARKER LORD	76
6.3.2	JOBY AEROSPACE COMPLETED ALL-ELECTRIC FLIGHT WITH ELECTRIC VERTICAL TAKE-OFF AIR TAXI	76
6.4	SUPPLY CHAIN ANALYSIS	76
FIGURE 23	SUPPLY CHAIN ANALYSIS	77
6.5	IMPACT OF MEGATREND	77
6.6	INNOVATIONS AND PATENT ANALYSIS	78
TABLE 8	INNOVATION AND PATENT REGISTRATIONS, 2019-2023	78
7	EVTOL AIRCRAFT MARKET, BY LIFT TECHNOLOGY	80
7.1	INTRODUCTION	81
FIGURE 24	VECTORED THRUST SEGMENT PROJECTED TO LEAD EVTOL AIRCRAFT MARKET DURING FORECAST PERIOD	81
TABLE 9	EVTOL AIRCRAFT MARKET, BY LIFT TECHNOLOGY, 2020-2022 (USD MILLION)	81
TABLE 10	EVTOL AIRCRAFT MARKET, BY LIFT TECHNOLOGY, 2023-2030 (USD MILLION)	81
7.2	VECTORED THRUST	82
7.2.1	BETTER EVTOL MANEUVERABILITY FOR OPTIMAL BUSINESS APPLICATIONS TO DRIVE MARKET	82
7.3	MULTIROTOR	82
7.3.1	UTILIZATION IN SHORT-RANGE OPERATIONS TO FUEL GROWTH	82
7.4	LIFT PLUS CRUISE	83
7.4.1	INCREASING ADOPTION BY LEADING EVTOL MANUFACTURERS TO DRIVE MARKET	83
8	EVTOL AIRCRAFT MARKET, BY PROPULSION TYPE	84
8.1	INTRODUCTION	85
FIGURE 25	FULLY ELECTRIC SEGMENT PROJECTED TO LEAD MARKET FOR EVTOL AIRCRAFT DURING FORECAST PERIOD	85
TABLE 11	EVTOL AIRCRAFT MARKET, BY PROPULSION TYPE, 2020-2022 (USD MILLION)	85
TABLE 12	EVTOL AIRCRAFT MARKET, BY PROPULSION TYPE, 2023-2030 (USD MILLION)	85
8.2	FULLY ELECTRIC	86
8.2.1	SILENT AND EMISSION-FREE PROPULSION TO DRIVE MARKET	86
8.3	HYBRID ELECTRIC	86
8.3.1	LONGER RANGE AND LARGER TAKE-OFF WEIGHT CAPABILITIES TO BOOST MARKET	86
8.4	HYDROGEN ELECTRIC	87
8.4.1	HIGH EFFICIENCY, LOW NOISE, AND LOW VIBRATION TO FUEL GROWTH	87
9	EVTOL AIRCRAFT MARKET, BY SYSTEM	88
9.1	INTRODUCTION	89
FIGURE 26	BATTERIES AND CELLS SEGMENT TO LEAD EVTOL MARKET DURING FORECAST PERIOD	89
TABLE 13	EVTOL AIRCRAFT MARKET, BY SYSTEM, 2020-2022 (USD MILLION)	89

TABLE 14	EVTOL AIRCRAFT MARKET, BY SYSTEM, 2023-2030 (USD MILLION)	90
9.2	BATTERIES AND CELLS	90
9.2.1	ADVANCEMENTS OFFERING HIGH POWER DENSITY TO FUEL MARKET	90
9.3	ELECTRIC MOTORS/ENGINES	90
9.3.1	BETTER POWER DENSITY AND LONGER RANGE TO DRIVE MARKET	90
9.4	AEROSTRUCTURES	91
9.4.1	ENHANCED PERFORMANCE AND ENERGY AND LOWER COSTS TO BOOST MARKET	91
9.5	AVIONICS	91
9.5.1	ADVANCED AVIONICS FOR URBAN AIR TO DRIVE MARKET	91
9.6	SOFTWARE	91
9.6.1	INCREASED USAGE IN EVTOL AIRCRAFT TO DRIVE MARKET	91
9.7	OTHER SOLUTIONS	92
9.7.1	LOWER WEIGHT AND BETTER RELIABILITY TO DRIVE MARKET	92
10	EVTOL AIRCRAFT MARKET, BY MODE OF OPERATION	93
10.1	INTRODUCTION	94
FIGURE 27	PILOTED SEGMENT PROJECTED TO LEAD MARKET DURING FORECAST PERIOD	94
TABLE 15	EVTOL AIRCRAFT MARKET, BY MODE OF OPERATION, 2020-2022 (USD MILLION)	94
TABLE 16	EVTOL AIRCRAFT MARKET, BY MODE OF OPERATION, 2023-2030 (USD MILLION)	94
10.2	PILOTED	95
10.2.1	NEED FOR QUICK TRANSPORTATION TO DRIVE MARKET	95
10.3	AUTONOMOUS	95
10.3.1	ADVANCED ALGORITHMS AND REAL-TIME SITUATIONAL AWARENESS TO INCREASE ADOPTION	95
11	EVTOL AIRCRAFT MARKET, BY APPLICATION	96
11.1	INTRODUCTION	97
FIGURE 28	LAST MILE DELIVERY SEGMENT PROJECTED TO GROW AT HIGHEST CAGR DURING FORECAST PERIOD	97
TABLE 17	EVTOL AIRCRAFT MARKET, BY APPLICATION, 2020-2022 (USD MILLION)	98
TABLE 18	EVTOL AIRCRAFT MARKET, BY APPLICATION, 2023-2030 (USD MILLION)	98
11.2	AIR TAXIS	99
11.2.1	RAPIDLY EXPANDING MEGACITIES TO INCREASE DEMAND	99
11.3	AIR SHUTTLES AND AIR METROS	99
11.3.1	RAPID TRANSPORTATION BETWEEN LARGE METROPOLITAN AREAS TO FUEL MARKET	99
11.4	PRIVATE TRANSPORT	99
11.4.1	SPEED AND ROUTING EFFICIENCIES TO BOOST MARKET	99
11.5	CARGO TRANSPORT	100
11.5.1	DEVELOPMENT OF CARGO TRANSPORT URBAN AIR MOBILITY APPLICATIONS TO DRIVE MARKET	100
11.6	AIR AMBULANCE AND MEDICAL EMERGENCY	100
11.6.1	ORGAN TRANSPORT AND EMERGENCY MEDICAL SERVICES TO DRIVE MARKET	100
11.7	LAST MILE DELIVERY	100
11.7.1	INCREASED DEMAND FOR CONTACTLESS DELIVERIES TO DRIVE MARKET	100
11.8	INSPECTION AND MONITORING	100
11.8.1	DRONES EQUIPPED WITH MULTISPECTRAL SENSORS USED ACROSS INDUSTRIES TO BOOST MARKET	100
11.9	SURVEYING AND MAPPING	101
11.9.1	FASTER COLLECTION OF TOPOGRAPHIC DATA WITH LOWER WORKFORCE TO FUEL MARKET	101
11.10	SURVEILLANCE	101
11.10.1	HI-TECH EVTOLS WITH HIGHLY ADVANCED SURVEILLANCE CAPABILITIES TO DRIVE MARKET	101
11.11	SPECIAL MISSION	102
11.11.1	INCREASED ADOPTION FOR CRITICAL MISSIONS TO DRIVE MARKET	102

Scotts International. EU Vat number: PL 6772247784

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

11.12	OTHER APPLICATIONS	102
11.12.1	RECREATIONAL APPLICATIONS TO DRIVE MARKET	102
12	EVTOL AIRCRAFT MARKET, BY MTOW	103
12.1	INTRODUCTION	104
FIGURE 29	EVTOL AIRCRAFT WITH MTOW OF 1,001-2,000 KG TO GROW AT HIGHEST RATE DURING FORECAST PERIOD	104
TABLE 19	EVTOL AIRCRAFT MARKET, BY MTOW, 2020-2022 (USD MILLION)	104
TABLE 20	EVTOL AIRCRAFT MARKET, BY MTOW, 2023-2030 (USD MILLION)	104
12.2	<100 KG	105
12.2.1	SHORT MILE APPLICATIONS TO DRIVE MARKET	105
12.3	100-1,000 KG	105
12.3.1	INCREASED CARGO TRANSPORTATION TO BOOST MARKET	105
12.4	1,001-2,000 KG	105
12.4.1	INTERCITY TRANSPORT OF PASSENGERS AND CARGO TO FUEL MARKET	105
12.5	>2,000 KG	106
12.5.1	DEMAND FOR INTRACITY TRANSPORTATION OF HEAVY CARGO TO DRIVE MARKET	106
13	EVTOL AIRCRAFT MARKET, BY RANGE	107
13.1	INTRODUCTION	108
FIGURE 30	>200 KM SEGMENT PROJECTED TO LEAD MARKET DURING FORECAST PERIOD	108
TABLE 21	EVTOL AIRCRAFT MARKET, BY RANGE, 2020-2022 (USD MILLION)	108
TABLE 22	EVTOL AIRCRAFT MARKET, BY RANGE, 2023-2030 (USD MILLION)	108
13.2	<=200 KM	109
13.2.1	INTRACITY TRAVEL USING URBAN AIR MOBILITY SERVICES TO DRIVE MARKET	109
13.3	>200 KM	109
13.3.1	HIGHER BATTERY CAPACITY TO BOOST DEMAND	109
14	EVTOL AIRCRAFT MARKET, REGIONAL ANALYSIS	110
14.1	INTRODUCTION	111
FIGURE 31	EVTOL AIRCRAFT MARKET: REGIONAL SNAPSHOT	111
TABLE 23	EVTOL AIRCRAFT MARKET, BY REGION, 2020-2022 (USD MILLION)	111
TABLE 24	EVTOL AIRCRAFT MARKET, BY REGION, 2023-2030 (USD MILLION)	112
14.2	NORTH AMERICA	112
FIGURE 32	NORTH AMERICA: EVTOL AIRCRAFT MARKET SNAPSHOT	113
14.2.1	NORTH AMERICA: PESTLE ANALYSIS	113
TABLE 25	NORTH AMERICA: EVTOL AIRCRAFT MARKET, BY COUNTRY, 2020-2022 (USD MILLION)	114
TABLE 26	NORTH AMERICA: EVTOL AIRCRAFT MARKET, BY COUNTRY, 2023-2030 (USD MILLION)	115
TABLE 27	NORTH AMERICA: EVTOL AIRCRAFT MARKET, BY LIFT TECHNOLOGY, 2020-2022 (USD MILLION)	115
TABLE 28	NORTH AMERICA: EVTOL AIRCRAFT MARKET, BY LIFT TECHNOLOGY, 2023-2030 (USD MILLION)	115
TABLE 29	NORTH AMERICA: EVTOL AIRCRAFT MARKET, BY PROPULSION TYPE, 2020-2022 (USD MILLION)	115
TABLE 30	NORTH AMERICA: EVTOL AIRCRAFT MARKET, BY PROPULSION TYPE, 2023-2030 (USD MILLION)	116
14.2.2	US	116
14.2.2.1	Presence of leading OEMs to drive market	116
TABLE 31	US: EVTOL AIRCRAFT MARKET, BY LIFT TECHNOLOGY, 2020-2022 (USD MILLION)	116
TABLE 32	US: EVTOL AIRCRAFT MARKET, BY LIFT TECHNOLOGY, 2023-2030 (USD MILLION)	117
TABLE 33	US: EVTOL AIRCRAFT MARKET, BY PROPULSION TYPE, 2020-2022 (USD MILLION)	117
TABLE 34	US: EVTOL AIRCRAFT MARKET, BY PROPULSION TYPE, 2023-2030 (USD MILLION)	117
14.2.3	CANADA	117
14.2.3.1	Aircraft modernization programs to boost market	117
TABLE 35	CANADA: EVTOL AIRCRAFT MARKET, BY LIFT TECHNOLOGY, 2020-2022 (USD MILLION)	118

TABLE 36 CANADA: EVTOL AIRCRAFT MARKET, BY LIFT TECHNOLOGY, 2023-2030 (USD MILLION) 118

TABLE 37 CANADA: EVTOL AIRCRAFT MARKET, BY PROPULSION TYPE, 2020-2022 (USD MILLION) 118

TABLE 38 CANADA: EVTOL AIRCRAFT MARKET, BY PROPULSION TYPE, 2023-2030 (USD MILLION) 118

14.3 EUROPE 119

FIGURE 33 EUROPE: EVTOL AIRCRAFT MARKET SNAPSHOT 119

14.3.1 EUROPE: PESTLE ANALYSIS 120

TABLE 39 EUROPE: EVTOL AIRCRAFT MARKET, BY COUNTRY, 2020-2022 (USD MILLION) 121

TABLE 40 EUROPE: EVTOL AIRCRAFT MARKET, BY COUNTRY, 2023-2030 (USD MILLION) 121

TABLE 41 EUROPE: EVTOL AIRCRAFT MARKET, BY LIFT TECHNOLOGY, 2020-2022 (USD MILLION) 121

TABLE 42 EUROPE: EVTOL AIRCRAFT MARKET, BY LIFT TECHNOLOGY, 2023-2030 (USD MILLION) 122

TABLE 43 EUROPE: EVTOL AIRCRAFT MARKET, BY PROPULSION TYPE, 2020-2022 (USD MILLION) 122

TABLE 44 EUROPE: EVTOL AIRCRAFT MARKET, BY PROPULSION TYPE, 2023-2030 (USD MILLION) 122

14.3.2 UK 122

14.3.2.1 Technological advancements in air travel to drive market 122

TABLE 45 UK: EVTOL AIRCRAFT MARKET, BY LIFT TECHNOLOGY, 2020-2022 (USD MILLION) 123

TABLE 46 UK: EVTOL AIRCRAFT MARKET, BY LIFT TECHNOLOGY, 2023-2030 (USD MILLION) 123

TABLE 47 UK: EVTOL AIRCRAFT MARKET, BY PROPULSION TYPE, 2020-2022 (USD MILLION) 123

TABLE 48 UK: EVTOL AIRCRAFT MARKET, BY PROPULSION TYPE, 2023-2030 (USD MILLION) 123

14.3.3 FRANCE 124

14.3.3.1 Significant investments in aviation industry to boost market 124

TABLE 49 FRANCE: EVTOL AIRCRAFT MARKET, BY LIFT TECHNOLOGY, 2020-2022 (USD MILLION) 124

TABLE 50 FRANCE: EVTOL AIRCRAFT MARKET, BY LIFT TECHNOLOGY, 2023-2030 (USD MILLION) 124

TABLE 51 FRANCE: EVTOL AIRCRAFT MARKET, BY PROPULSION TYPE, 2020-2022 (USD MILLION) 124

TABLE 52 FRANCE: EVTOL AIRCRAFT MARKET, BY PROPULSION TYPE, 2023-2030 (USD MILLION) 125

14.3.4 GERMANY 125

14.3.4.1 Rising investments in air travel and connectivity to fuel market 125

TABLE 53 GERMANY: EVTOL AIRCRAFT MARKET, BY LIFT TECHNOLOGY, 2020-2022 (USD MILLION) 125

TABLE 54 GERMANY: EVTOL AIRCRAFT MARKET, BY LIFT TECHNOLOGY, 2023-2030 (USD MILLION) 125

TABLE 55 GERMANY: EVTOL AIRCRAFT MARKET, BY PROPULSION TYPE, 2020-2022 (USD MILLION) 126

TABLE 56 GERMANY: EVTOL AIRCRAFT MARKET, BY PROPULSION TYPE, 2023-2030 (USD MILLION) 126

14.3.5 SWITZERLAND 126

14.3.5.1 Increasing development toward zero-carbon emission goal to fuel market 126

TABLE 57 SWITZERLAND: EVTOL AIRCRAFT MARKET, BY LIFT TECHNOLOGY, 2020-2022 (USD MILLION) 126

TABLE 58 SWITZERLAND: EVTOL AIRCRAFT MARKET, BY LIFT TECHNOLOGY, 2023-2030 (USD MILLION) 127

TABLE 59 SWITZERLAND: EVTOL AIRCRAFT MARKET, BY PROPULSION TYPE, 2020-2022 (USD MILLION) 127

TABLE 60 SWITZERLAND: EVTOL AIRCRAFT MARKET, BY PROPULSION TYPE, 2023-2030 (USD MILLION) 127

14.3.6 NETHERLANDS 127

14.3.6.1 Strategic partnerships in UAM ecosystem to boost market 127

TABLE 61 NETHERLANDS: EVTOL AIRCRAFT MARKET, BY LIFT TECHNOLOGY, 2020-2022 (USD MILLION) 128

TABLE 62 NETHERLANDS: EVTOL AIRCRAFT MARKET, BY LIFT TECHNOLOGY, 2023-2030 (USD MILLION) 128

TABLE 63 NETHERLANDS: EVTOL AIRCRAFT MARKET, BY PROPULSION TYPE, 2020-2022 (USD MILLION) 128

TABLE 64 NETHERLANDS: EVTOL AIRCRAFT MARKET, BY PROPULSION TYPE, 2023-2030 (USD MILLION) 128

14.3.7 REST OF EUROPE 129

14.3.7.1 Presence of leading manufacturers and need to reduce carbon footprint to drive market 129

TABLE 65 REST OF EUROPE: EVTOL AIRCRAFT MARKET, BY LIFT TECHNOLOGY, 2020-2022 (USD MILLION) 129

TABLE 66 REST OF EUROPE: EVTOL AIRCRAFT MARKET, BY LIFT TECHNOLOGY, 2023-2030 (USD MILLION) 129

TABLE 67 REST OF EUROPE: EVTOL AIRCRAFT MARKET, BY PROPULSION TYPE, 2020-2022 (USD MILLION) 129

Scotts International. EU Vat number: PL 6772247784

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

TABLE 68□REST OF EUROPE: EVTOL AIRCRAFT MARKET, BY PROPULSION TYPE, 2023-2030 (USD MILLION)□130

14.4□MIDDLE EAST□130

FIGURE 34□MIDDLE EAST: EVTOL AIRCRAFT MARKET SNAPSHOT□131

14.4.1□MIDDLE EAST: PESTLE ANALYSIS□131

TABLE 69□MIDDLE EAST: EVTOL AIRCRAFT MARKET, BY COUNTRY, 2020-2022 (USD MILLION)□132

TABLE 70□MIDDLE EAST: EVTOL AIRCRAFT MARKET, BY COUNTRY, 2023-2030 (USD MILLION)□133

TABLE 71□MIDDLE EAST: EVTOL AIRCRAFT MARKET, BY LIFT TECHNOLOGY, 2020-2022 (USD MILLION)□133

TABLE 72□MIDDLE EAST: EVTOL AIRCRAFT MARKET, BY LIFT TECHNOLOGY, 2023-2030 (USD MILLION)□133

TABLE 73□MIDDLE EAST: EVTOL AIRCRAFT MARKET, BY PROPULSION TYPE, 2020-2022 (USD MILLION)□134

TABLE 74□MIDDLE EAST: EVTOL AIRCRAFT MARKET, BY PROPULSION TYPE, 2023-2030 (USD MILLION)□134

14.4.2□ISRAEL□134

14.4.2.1□Increased spending on R&D for UAVs for military and commercial applications to drive market□134

TABLE 75□ISRAEL: EVTOL AIRCRAFT MARKET, BY LIFT TECHNOLOGY, 2020-2022 (USD MILLION)□135

TABLE 76□ISRAEL: EVTOL AIRCRAFT MARKET, BY LIFT TECHNOLOGY, 2023-2030 (USD MILLION)□135

TABLE 77□ISRAEL: EVTOL AIRCRAFT MARKET, BY PROPULSION TYPE, 2020-2022 (USD MILLION)□135

TABLE 78□ISRAEL: EVTOL AIRCRAFT MARKET, BY PROPULSION TYPE, 2023-2030 (USD MILLION)□135

14.4.3□UAE□136

14.4.3.1□Increased focus on efficient urban air mobility ecosystem to boost market□136

TABLE 79□UAE: EVTOL AIRCRAFT MARKET, BY LIFT TECHNOLOGY, 2020-2022 (USD MILLION)□136

TABLE 80□UAE: EVTOL AIRCRAFT MARKET, BY LIFT TECHNOLOGY, 2023-2030 (USD MILLION)□136

TABLE 81□UAE: EVTOL AIRCRAFT MARKET, BY PROPULSION TYPE, 2020-2022 (USD MILLION)□136

TABLE 82□UAE: EVTOL AIRCRAFT MARKET, BY PROPULSION TYPE, 2023-2030 (USD MILLION)□137

14.4.4□SAUDI ARABIA□137

14.4.4.1□Increased investments in eVTOL technology to boost market□137

TABLE 83□SAUDI ARABIA: EVTOL AIRCRAFT MARKET, BY LIFT TECHNOLOGY, 2020-2022 (USD MILLION)□137

TABLE 84□SAUDI ARABIA: EVTOL AIRCRAFT MARKET, BY LIFT TECHNOLOGY, 2023-2030 (USD MILLION)□137

TABLE 85□SAUDI ARABIA: EVTOL AIRCRAFT MARKET, BY PROPULSION TYPE, 2020-2022 (USD MILLION)□138

TABLE 86□SAUDI ARABIA: EVTOL AIRCRAFT MARKET, BY PROPULSION TYPE, 2023-2030 (USD MILLION)□138

14.4.5□TURKEY□138

14.4.5.1□Increased spending on technologically advanced UAVs and eVTOL aircraft to boost market□138

TABLE 87□TURKEY: EVTOL AIRCRAFT MARKET, BY LIFT TECHNOLOGY, 2020-2022 (USD MILLION)□138

TABLE 88□TURKEY: EVTOL AIRCRAFT MARKET, BY LIFT TECHNOLOGY, 2023-2030 (USD MILLION)□139

TABLE 89□TURKEY: EVTOL AIRCRAFT MARKET, BY PROPULSION TYPE, 2020-2022 (USD MILLION)□139

TABLE 90□TURKEY: EVTOL AIRCRAFT MARKET, BY PROPULSION TYPE, 2023-2030 (USD MILLION)□139

14.4.6□REST OF MIDDLE EAST□139

14.4.6.1□Increasing military spending to fuel market□139

TABLE 91□REST OF MIDDLE EAST: EVTOL AIRCRAFT MARKET, BY LIFT TECHNOLOGY, 2020-2022 (USD MILLION)□140

TABLE 92□REST OF MIDDLE EAST: EVTOL AIRCRAFT MARKET, BY LIFT TECHNOLOGY, 2023-2030 (USD MILLION)□140

TABLE 93□REST OF MIDDLE EAST: EVTOL AIRCRAFT MARKET, BY PROPULSION TYPE, 2020-2022 (USD MILLION)□140

TABLE 94□REST OF MIDDLE EAST: EVTOL AIRCRAFT MARKET, BY PROPULSION TYPE, 2023-2030 (USD MILLION)□140

14.5□ASIA PACIFIC□141

FIGURE 35□ASIA PACIFIC: EVTOL AIRCRAFT MARKET SNAPSHOT□141

14.5.1□ASIA PACIFIC: PESTLE ANALYSIS□142

TABLE 95□ASIA PACIFIC: EVTOL AIRCRAFT MARKET, BY COUNTRY, 2020-2022 (USD MILLION)□143

TABLE 96□ASIA PACIFIC: EVTOL AIRCRAFT MARKET, BY COUNTRY, 2023-2030 (USD MILLION)□143

TABLE 97□ASIA PACIFIC: EVTOL AIRCRAFT MARKET, BY LIFT TECHNOLOGY, 2020-2022 (USD MILLION)□143

TABLE 98□ASIA PACIFIC: EVTOL AIRCRAFT MARKET, BY LIFT TECHNOLOGY, 2023-2030 (USD MILLION)□144

Scotts International. EU Vat number: PL 6772247784

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

TABLE 99	ASIA PACIFIC: EVTOL AIRCRAFT MARKET, BY PROPULSION TYPE, 2020-2022 (USD MILLION)	144
TABLE 100	ASIA PACIFIC: EVTOL AIRCRAFT MARKET, BY PROPULSION TYPE, 2023-2030 (USD MILLION)	144
14.5.2	CHINA	144
14.5.2.1	Increasing domestic travel and air traffic to drive market	144
TABLE 101	CHINA: EVTOL AIRCRAFT MARKET, BY LIFT TECHNOLOGY, 2020-2022 (USD MILLION)	145
TABLE 102	CHINA: EVTOL AIRCRAFT MARKET, BY LIFT TECHNOLOGY, 2023-2030 (USD MILLION)	145
TABLE 103	CHINA: EVTOL AIRCRAFT MARKET, BY PROPULSION TYPE, 2020-2022 (USD MILLION)	145
TABLE 104	CHINA: EVTOL AIRCRAFT MARKET, BY PROPULSION TYPE, 2023-2030 (USD MILLION)	145
14.5.3	INDIA	146
14.5.3.1	Five-year modernization plan for armed forces to boost market	146
TABLE 105	INDIA: EVTOL AIRCRAFT MARKET, BY LIFT TECHNOLOGY, 2020-2022 (USD MILLION)	146
TABLE 106	INDIA: EVTOL AIRCRAFT MARKET, BY LIFT TECHNOLOGY, 2023-2030 (USD MILLION)	146
TABLE 107	INDIA: EVTOL AIRCRAFT MARKET, BY PROPULSION TYPE, 2020-2022 (USD MILLION)	146
TABLE 108	INDIA: EVTOL AIRCRAFT MARKET, BY PROPULSION TYPE, 2023-2030 (USD MILLION)	147
14.5.4	JAPAN	147
14.5.4.1	In-house development of eVTOL aircraft to drive market	147
TABLE 109	JAPAN: EVTOL AIRCRAFT MARKET, BY LIFT TECHNOLOGY, 2020-2022 (USD MILLION)	147
TABLE 110	JAPAN: EVTOL AIRCRAFT MARKET, BY LIFT TECHNOLOGY, 2023-2030 (USD MILLION)	147
TABLE 111	JAPAN: EVTOL AIRCRAFT MARKET, BY PROPULSION TYPE, 2020-2022 (USD MILLION)	148
TABLE 112	JAPAN: EVTOL AIRCRAFT MARKET, BY PROPULSION TYPE, 2023-2030 (USD MILLION)	148
14.5.5	AUSTRALIA	148
14.5.5.1	Increased air traffic and new aircraft deliveries to fuel market	148
TABLE 113	AUSTRALIA: EVTOL AIRCRAFT MARKET, BY LIFT TECHNOLOGY, 2020-2022 (USD MILLION)	148
TABLE 114	AUSTRALIA: EVTOL AIRCRAFT MARKET, BY LIFT TECHNOLOGY, 2023-2030 (USD MILLION)	149
TABLE 115	AUSTRALIA: EVTOL AIRCRAFT MARKET, BY PROPULSION TYPE, 2020-2022 (USD MILLION)	149
TABLE 116	AUSTRALIA: EVTOL AIRCRAFT MARKET, BY PROPULSION TYPE, 2023-2030 (USD MILLION)	149
14.5.6	SOUTH KOREA	149
14.5.6.1	Growing commercialization of urban taxis and fully autonomous UAM to drive market	149
TABLE 117	SOUTH KOREA: EVTOL AIRCRAFT MARKET, BY LIFT TECHNOLOGY, 2020-2022 (USD MILLION)	150
TABLE 118	SOUTH KOREA: EVTOL AIRCRAFT MARKET, BY LIFT TECHNOLOGY, 2023-2030 (USD MILLION)	150
TABLE 119	SOUTH KOREA: EVTOL AIRCRAFT MARKET, BY PROPULSION TYPE, 2020-2022 (USD MILLION)	150
TABLE 120	SOUTH KOREA: EVTOL AIRCRAFT MARKET, BY PROPULSION TYPE, 2023-2030 (USD MILLION)	150
14.5.7	REST OF ASIA PACIFIC	151
14.5.7.1	Increased UAM investment and military spending to drive market	151
TABLE 121	REST OF ASIA PACIFIC: EVTOL AIRCRAFT MARKET, BY LIFT TECHNOLOGY, 2020-2022 (USD MILLION)	151
TABLE 122	REST OF ASIA PACIFIC: EVTOL AIRCRAFT MARKET, BY LIFT TECHNOLOGY, 2023-2030 (USD MILLION)	151
TABLE 123	REST OF ASIA PACIFIC: EVTOL AIRCRAFT MARKET, BY PROPULSION TYPE, 2020-2022 (USD MILLION)	151
TABLE 124	REST OF ASIA PACIFIC: EVTOL AIRCRAFT MARKET, BY PROPULSION TYPE, 2023-2030 (USD MILLION)	152
14.6	LATIN AMERICA	152
FIGURE 36	LATIN AMERICA: EVTOL AIRCRAFT MARKET SNAPSHOT	152
14.6.1	LATIN AMERICA: PESTLE ANALYSIS	153
TABLE 125	LATIN AMERICA: EVTOL AIRCRAFT MARKET, BY COUNTRY, 2020-2022 (USD MILLION)	154
TABLE 126	LATIN AMERICA: EVTOL AIRCRAFT MARKET, BY COUNTRY, 2023-2030 (USD MILLION)	154
TABLE 127	LATIN AMERICA: EVTOL AIRCRAFT MARKET, BY LIFT TECHNOLOGY, 2020-2022 (USD MILLION)	154
TABLE 128	LATIN AMERICA: EVTOL AIRCRAFT MARKET, BY LIFT TECHNOLOGY, 2023-2030 (USD MILLION)	154
TABLE 129	LATIN AMERICA: EVTOL AIRCRAFT MARKET, BY PROPULSION TYPE, 2020-2022 (USD MILLION)	155
TABLE 130	LATIN AMERICA: EVTOL AIRCRAFT MARKET, BY PROPULSION TYPE, 2023-2030 (USD MILLION)	155

14.6.2	BRAZIL	155
14.6.2.1	Huge investments from manufacturing companies to drive market	155
TABLE 131	BRAZIL: EVTOL AIRCRAFT MARKET, BY LIFT TECHNOLOGY, 2020-2022 (USD MILLION)	155
TABLE 132	BRAZIL: EVTOL AIRCRAFT MARKET, BY LIFT TECHNOLOGY, 2023-2030 (USD MILLION)	156
TABLE 133	BRAZIL: EVTOL AIRCRAFT MARKET, BY PROPULSION TYPE, 2020-2022 (USD MILLION)	156
TABLE 134	BRAZIL: EVTOL AIRCRAFT MARKET, BY PROPULSION TYPE, 2023-2030 (USD MILLION)	156
14.6.3	MEXICO	156
14.6.3.1	Growing demand for urban air mobility to fuel market	156
TABLE 135	MEXICO: EVTOL AIRCRAFT MARKET, BY LIFT TECHNOLOGY, 2020-2022 (USD MILLION)	157
TABLE 136	MEXICO: EVTOL AIRCRAFT MARKET, BY LIFT TECHNOLOGY, 2023-2030 (USD MILLION)	157
TABLE 137	MEXICO: EVTOL AIRCRAFT MARKET, BY PROPULSION TYPE, 2020-2022 (USD MILLION)	157
TABLE 138	MEXICO: EVTOL AIRCRAFT MARKET, BY PROPULSION TYPE, 2023-2030 (USD MILLION)	157
14.6.4	REST OF LATIN AMERICA	158
14.6.4.1	Favorable government policies and regulatory developments to boost market	158
TABLE 139	REST OF LATIN AMERICA: EVTOL AIRCRAFT MARKET, BY LIFT TECHNOLOGY, 2020-2022 (USD MILLION)	158
TABLE 140	REST OF LATIN AMERICA: EVTOL AIRCRAFT MARKET, BY LIFT TECHNOLOGY, 2023-2030 (USD MILLION)	158
TABLE 141	REST OF LATIN AMERICA: EVTOL AIRCRAFT MARKET, BY PROPULSION TYPE, 2020-2022 (USD MILLION)	158
TABLE 142	REST OF LATIN AMERICA: EVTOL AIRCRAFT MARKET, BY PROPULSION TYPE, 2023-2030 (USD MILLION)	159
14.7	AFRICA	159
FIGURE 37	AFRICA: EVTOL AIRCRAFT MARKET SNAPSHOT	159
TABLE 143	AFRICA: EVTOL AIRCRAFT MARKET, BY LIFT TECHNOLOGY, 2020-2022 (USD MILLION)	160
TABLE 144	AFRICA: EVTOL AIRCRAFT MARKET, BY LIFT TECHNOLOGY, 2023-2030 (USD MILLION)	160
TABLE 145	AFRICA: EVTOL AIRCRAFT MARKET, BY PROPULSION TYPE, 2020-2022 (USD MILLION)	160
TABLE 146	AFRICA: EVTOL AIRCRAFT MARKET, BY PROPULSION TYPE, 2023-2030 (USD MILLION)	160
14.7.1	SOUTH AFRICA	161
14.7.1.1	Government support and investment in infrastructure development to drive market	161
14.7.2	NIGERIA	161
14.7.2.1	Growing demand for innovative mobility solutions to drive market	161
14.7.3	REST OF AFRICA	161
14.7.3.1	Rising awareness and interest in sustainable mobility solutions to boost market	161
15	COMPETITIVE LANDSCAPE	162
15.1	INTRODUCTION	162
15.2	RANKING OF LEADING PLAYERS, 2023	162
FIGURE 38	MARKET RANKING OF LEADING PLAYERS IN EVTOL AIRCRAFT MARKET, 2023	162
15.3	MARKET SHARE ANALYSIS, 2022	162
FIGURE 39	MARKET SHARE OF TOP PLAYERS IN EVTOL AIRCRAFT MARKET, 2022	162
FIGURE 40	REVENUE ANALYSIS OF TOP 5 MARKET PLAYERS, 2022	163
15.4	COMPETITIVE OVERVIEW	164
TABLE 147	KEY DEVELOPMENTS BY LEADING PLAYERS IN EVTOL AIRCRAFT MARKET (2021-2023)	164
15.5	COMPANY PRODUCT FOOTPRINT ANALYSIS	165
TABLE 148	COMPANY FOOTPRINT	165
TABLE 149	APPLICATION FOOTPRINT	166
TABLE 150	RANGE FOOTPRINT	167
TABLE 151	SYSTEM FOOTPRINT	168
TABLE 152	REGIONAL FOOTPRINT	169
15.6	COMPANY EVALUATION MATRIX	170
15.6.1	STARS	170

15.6.2	EMERGING LEADERS	170
15.6.3	PERVASIVE PLAYERS	170
15.6.4	PARTICIPANTS	170
FIGURE 41	EVTOL AIRCRAFT MARKET COMPETITIVE LEADERSHIP MAPPING, 2023	171
15.7	STARTUP/SME EVALUATION MATRIX	171
15.7.1	PROGRESSIVE COMPANIES	171
15.7.2	RESPONSIVE COMPANIES	171
15.7.3	DYNAMIC COMPANIES	172
15.7.4	STARTING BLOCKS	172
FIGURE 42	EVTOL AIRCRAFT MARKET: STARTUP/SME COMPETITIVE LEADERSHIP MAPPING, 2023	172
15.7.5	COMPETITIVE BENCHMARKING	173
TABLE 153	EVTOL AIRCRAFT MARKET: DETAILED LIST OF KEY STARTUP/SMES	173
15.8	COMPETITIVE SCENARIO	173
15.8.1	DEALS	173
TABLE 154	DEALS, 2021-2023	173
15.8.2	PRODUCT LAUNCHES	177
16	COMPANY PROFILES	178
16.1	KEY PLAYERS	178
	(Business overview, Products offered, Recent developments, MnM view, Right to win, Strategic choices, and Weaknesses and competitive threats)*	
16.1.1	AIRBUS SE	178
TABLE 155	AIRBUS SE: COMPANY OVERVIEW	178
FIGURE 43	AIRBUS SE: COMPANY SNAPSHOT	179
TABLE 156	AIRBUS SE: PRODUCTS OFFERED?	179
TABLE 157	AIRBUS SE: DEALS	180
16.1.2	ELBIT SYSTEMS LTD.	182
TABLE 158	ELBIT SYSTEMS LTD.: COMPANY OVERVIEW	182
FIGURE 44	ELBIT SYSTEMS LTD.: COMPANY SNAPSHOT	183
TABLE 159	ELBIT SYSTEMS LTD.: PRODUCTS OFFERED?	183
TABLE 160	ELBIT SYSTEMS LTD.: DEALS	184
16.1.3	BELL TEXTRON INC.	185
TABLE 161	BELL TEXTRON INC.: COMPANY OVERVIEW	185
FIGURE 45	BELL TEXTRON INC.: COMPANY SNAPSHOT	185
TABLE 162	BELL TEXTRON INC.: PRODUCTS OFFERED?	186
16.1.4	EHANG HOLDINGS LTD.	188
TABLE 163	EHANG HOLDINGS LTD.: COMPANY OVERVIEW	188
FIGURE 46	EHANG HOLDINGS LTD.: COMPANY SNAPSHOT	189
TABLE 164	EHANG HOLDINGS LTD.: PRODUCTS OFFERED?	189
TABLE 165	EHANG HOLDINGS LTD.: DEALS	190
16.1.5	EMBRAER SA	191
TABLE 166	EMBRAER SA: COMPANY OVERVIEW	191
FIGURE 47	EMBRAER SA: COMPANY SNAPSHOT	192
TABLE 167	EMBRAER SA: PRODUCTS OFFERED?	192
TABLE 168	EMBRAER SA: DEALS	193
16.1.6	ISRAEL AEROSPACE INDUSTRIES	195
TABLE 169	ISRAEL AEROSPACE INDUSTRIES: COMPANY OVERVIEW	195
FIGURE 48	ISRAEL AEROSPACE INDUSTRIES: COMPANY SNAPSHOT	195

TABLE 170	ISRAEL AEROSPACE INDUSTRIES: PRODUCTS OFFERED?	196
16.1.7	PIPISTREL	197
TABLE 171	PIPISTREL: COMPANY OVERVIEW	197
TABLE 172	PIPISTREL: PRODUCTS OFFERED?	197
TABLE 173	PIPISTREL: DEALS	198
16.1.8	ELROY AIR	199
TABLE 174	ELROY AIR: COMPANY OVERVIEW	199
TABLE 175	ELROY AIR: PRODUCTS OFFERED?	199
TABLE 176	ELROY AIR: DEALS	199
16.1.9	LILIUM GMBH	200
TABLE 177	LILIUM GMBH: COMPANY OVERVIEW	200
TABLE 178	LILIUM GMBH: PRODUCTS OFFERED?	200
TABLE 179	LILIUM GMBH: DEALS	200
16.1.10	JOBY AVIATION, INC.	202
TABLE 180	JOBY AVIATION, INC.: COMPANY OVERVIEW	202
TABLE 181	JOBY AVIATION, INC.: PRODUCTS OFFERED?	202
TABLE 182	JOBY AVIATION, INC.: DEALS	203
16.1.11	ARCHER AVIATION INC.	204
TABLE 183	ARCHER AVIATION INC.: COMPANY OVERVIEW	204
TABLE 184	ARCHER AVIATION INC.: PRODUCTS OFFERED?	204
TABLE 185	ARCHER AVIATION INC.: DEALS	205
16.1.12	VOLOCOPTER GMBH	206
TABLE 186	VOLOCOPTER GMBH: COMPANY OVERVIEW	206
TABLE 187	VOLOCOPTER GMBH: PRODUCTS OFFERED?	206
TABLE 188	VOLOCOPTER GMBH: DEALS	207
16.1.13	SZ DJI TECHNOLOGY CO., LTD.	209
TABLE 189	SZ DJI TECHNOLOGY CO., LTD.: COMPANY OVERVIEW	209
TABLE 190	SZ DJI TECHNOLOGY CO., LTD.: PRODUCTS OFFERED?	209
16.1.14	SAMAD AEROSPACE	211
TABLE 191	SAMAD AEROSPACE: COMPANY OVERVIEW	211
TABLE 192	SAMAD AEROSPACE: PRODUCTS OFFERED?	211
16.1.15	AURORA FLIGHT SCIENCES	212
TABLE 193	AURORA FLIGHT SCIENCES: COMPANY OVERVIEW	212
TABLE 194	AURORA FLIGHT SCIENCES: PRODUCTS OFFERED?	212
TABLE 195	AURORA FLIGHT SCIENCES: DEALS	213
16.1.16	VERTICAL AEROSPACE GROUP LTD.	214
TABLE 196	VERTICAL AEROSPACE GROUP LTD.: COMPANY OVERVIEW	214
TABLE 197	VERTICAL AEROSPACE GROUP LTD.: PRODUCTS OFFERED?	214
TABLE 198	VERTICAL AEROSPACE GROUP LTD.: DEALS	214
16.1.17	URBAN AERONAUTICS LTD.	216
TABLE 199	URBAN AERONAUTICS LTD.: COMPANY OVERVIEW	216
TABLE 200	URBAN AERONAUTICS LTD.: PRODUCTS OFFERED?	216
TABLE 201	URBAN AERONAUTICS LTD.: DEALS	216
16.2	OTHER PLAYERS	217
16.2.1	AUNT AIR MOBILITY	217
16.2.2	OVERAIR	217
16.2.3	BETA TECHNOLOGIES	218

Scotts International. EU Vat number: PL 6772247784

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

16.2.4 DELOREAN AEROSPACE 218

16.2.5 SKYDRIVE INC. 218

16.2.6 TERRAFUGIA 219

16.2.7 WISK AERO LLC 219

16.2.8 OPENER, INC. 219

*Details on Business overview, Products offered, Recent developments, MnM view, Right to win, Strategic choices, and Weaknesses and competitive threats might not be captured in case of unlisted companies.

17 APPENDIX 220

17.1 DISCUSSION GUIDE 220

17.2 KNOWLEDGESTORE: MARKETSANDMARKETS' SUBSCRIPTION PORTAL 223

17.3 CUSTOMIZATION OPTIONS 225

17.4 RELATED REPORTS 225

17.5 AUTHOR DETAILS 226

Scotts International. EU Vat number: PL 6772247784

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

eVTOL Aircraft Market by Lift Technology, Propulsion Type, System (Batteries & Cells, Electric Motors/Engine, Aerostructures, Avionics, Software), Mode of Operation, Application, Mtow, Range and Region - Global Forecast to 2035

Market Report | 2023-07-25 | 219 pages | MarketsandMarkets

To place an Order with Scotts International:

- ☐ - Print this form
- ☐ - Complete the relevant blank fields and sign
- ☐ - Send as a scanned email to support@scotts-international.com

ORDER FORM:

Select license	License	Price
	Single User	\$4950.00
	Multi User	\$6650.00
	Corporate License	\$8150.00
	Enterprise Site License	\$10000.00
		VAT
		Total

*Please circle the relevant license option. For any questions please contact support@scotts-international.com or 0048 603 394 346.

** VAT will be added at 23% for Polish based companies, individuals and EU based companies who are unable to provide a valid EU Vat Numbers.

Email*	<input type="text"/>	Phone*	<input type="text"/>
First Name*	<input type="text"/>	Last Name*	<input type="text"/>
Job title*	<input type="text"/>		
Company Name*	<input type="text"/>	EU Vat / Tax ID / NIP number*	<input type="text"/>
Address*	<input type="text"/>	City*	<input type="text"/>
Zip Code*	<input type="text"/>	Country*	<input type="text"/>

Scotts International. EU Vat number: PL 6772247784

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

Date

2025-05-20

Signature



Scotts International. EU Vat number: PL 6772247784

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com