

Hypersonic Flight Market by Vehicle Type (Hypersonic Aircraft, Hypersonic Spacecraft), Industry (Military, Space, Commercial), Component (Propulsion, Aerostructure, Avionics) and Region (North America, Europe, APAC, RoW) - Global forecast to 2030

Market Report | 2023-11-07 | 189 pages | MarketsandMarkets

AVAILABLE LICENSES:

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

Report description:

The Hypersonic Flight Market is estimated to be USD 782 million in 2023 and is projected to reach USD 1,154 million by 2030, at a CAGR of 5.7% during the forecast period. Technological Advancements such as advances in materials science, propulsion systems, aerodynamics, and avionics are making hypersonic flight more feasible, efficient, and reliable. These technological breakthroughs reduce barriers and enhance the safety and performance of hypersonic flight systems.

" Space": The Largest segment by Industry during the forecast period." Based on industry, the hypersonic flight market has been segmented into Space, military and commercial. Space Segment is expected to acquire the largest market share during the forecast period. Hypersonic flight within the space industry is well-positioned to acquire the highest market share during the forecast period due to its transformative potential in shaping the future of space exploration and commercial space activities. Hypersonic technology offers game-changing advantages for access to space and beyond, making it a critical component of the evolving space industry. Hypersonic flight enables rapid, reusable access to space, which addresses the pressing need for more cost-effective and frequent space missions. The ability to transport payloads to orbit swiftly is crucial in a space industry where efficiency, rapid deployment, and cost savings are paramount. With the promise of reduced launch costs, quicker turnaround times, and an increased cadence of satellite deployments, hypersonic technology aligns with the growing demands for satellite services, space-based connectivity, and Earth observation.

"Hypersonic Aircraft": The fastest growing segment by vehicle type during the forecast period." Based on vehicle Type, the

Scotts International. EU Vat number: PL 6772247784

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

www.scotts-international.com

hypersonic flight market has been segmented into Hypersonic Spacecraft and hypersonic aircraft. Hypersonic aircraft offer unparalleled speed and maneuverability, making them attractive for military and defense applications. Nations are heavily investing in hypersonic technology to enhance their defense capabilities providing rapid, unpredictable, and precise strike capabilities. Commercial aviation companies are actively exploring the development of hypersonic passenger aircraft. These aircraft have the potential to revolutionize air travel by significantly reducing intercontinental flight times, making them an attractive prospect for airlines and travelers.

" Avionics": The fastest growing segment by component during the forecast period."

Hypersonic avionics are anticipated to experience the highest growth rate during the forecast period due to their pivotal role in unlocking the full potential of hypersonic flight technology. Avionics systems tailored for hypersonic platforms are essential for ensuring safety, precision, and functionality during flight. As hypersonic flight involves extreme velocities, high temperatures, and complex maneuvering, sophisticated avionics become paramount for real-time data analysis, navigation, guidance, and control. "US to account for the highest market share in the hypersonic flight Market in the forecasted year."

US has witnessed significant growth in the development of hypersonic flight in recent years. Several factors contribute to this trend:

- Leadership in Aerospace and Defense: The United States has a long history of leadership in aerospace and defense technology. The country's extensive experience in aviation, space exploration, and military capabilities provides a solid foundation for the development of hypersonic technology.

- Extensive Research and Development: The U.S. government, in collaboration with private aerospace companies, has been investing significantly in hypersonic research and development. Initiatives like the Defense Advanced Research Projects Agency's (DARPA) hypersonic programs and NASA's hypersonic research projects demonstrate the country's commitment to advancing hypersonic technology.

Break-up of profiles of primary participants in the hypersonic flight market: By Company Type: Tier 1 - 35%, Tier 2 - 45%, and Tier 3 - 20% By Designation: C-Level Executives - 35%, Director level - 25%, and Others - 40% By Region: North America - 25%, Asia Pacific - 45%, Europe - 15%, Rest of the world - 15%

Prominent companies in the hypersonic flight market are Leidos (US) Hermeus (US), Rolls-Royce (UK), Dassault Aviation (France), The Boeing Company (US) Raytheon Technologies Corporation (US), BAE Systems plc (UK), among others.

Research Coverage: The market study covers the Hypersonic Flight market across segments. It aims at estimating the market size and the growth potential of this market across different segments, such as vehicle type, industry, component, and region. The study also includes an in-depth competitive analysis of the key players in the market, along with their company profiles, key observations related to product and business offerings, recent developments, and key market strategies. Key benefits of buying this report: This report will help the market leaders/new entrants in this market with information on the closest approximations of the revenue numbers for the overall hypersonic market and its subsegments. The report covers the entire ecosystem of the hypersonic flight industry and will help stakeholders understand the competitive landscape and gain more insights to better position their businesses and plan suitable go-to-market strategies. The report will also help stakeholders understand the pulse of the market and provide them with information on key market drivers, restraints, challenges, and opportunities.

The report provides insights on the following pointers:

- Analysis of key drivers (Rising Demand for Fast and Efficient Transportation, Increasing focus on military modernization, Space Exploration Ambitions, Technological Advancements in propulsion and aerodynamics, Increased Investments in Hypersonic Technologies, Growing Competition in the Aerospace Industry) Restraints (Cost and Complexity of manufacturing, High Velocity and Complex Operational Protocols, Lack of established regulations) opportunities (Global Collaboration for joint projects, Space Tourism) and challenges (Materials and Heat Management, Lack of Infrastructure, Limited Availability of Qualified

Scotts International. EU Vat number: PL 6772247784

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

www.scotts-international.com

Personal) that impact the growth of the hypersonic flight market.

- Product Development/Innovation: Detailed insights on upcoming technologies, research & development activities, and new product & service launches in the hypersonic flight market.
- Market Development: Comprehensive information about lucrative markets - the report analyses the hypersonic flight market across varied regions
- Market Diversification: Exhaustive information about new products & services, untapped geographies, recent developments, and investments in the hypersonic flight market.
- Competitive Assessment: In-depth assessment of market shares, growth strategies and service offerings of leading players like Leidos (US) Hermeus (US), Rolls-Royce (UK), Dassault Aviation (France), The Boeing Company (US) Raytheon Technologies Corporation (US), BAE Systems Plc (UK), among others in the hypersonic flight market.

Table of Contents:

1 INTRODUCTION 26

1.1 STUDY OBJECTIVES 26

1.2 MARKET DEFINITION 26

1.3 MARKET SCOPE 27

1.3.1 MARKETS COVERED 27

FIGURE 1 HYPERSONIC FLIGHT MARKET SEGMENTATION 27

1.3.2 REGIONAL SCOPE 27

1.3.3 YEARS CONSIDERED 28

1.4 INCLUSIONS AND EXCLUSIONS 28

TABLE 1 INCLUSIONS AND EXCLUSIONS 28

1.5 CURRENCY CONSIDERED 29

TABLE 2 USD EXCHANGE RATES 29

1.6 STAKEHOLDERS 29

1.7 SUMMARY OF CHANGES 29

2 RESEARCH METHODOLOGY 30

2.1 RESEARCH DATA 30

FIGURE 2 RESEARCH PROCESS FLOW 30

FIGURE 3 RESEARCH DESIGN 31

2.1.1 SECONDARY DATA 31

2.1.1.1 Key data from secondary sources 32

2.1.2 PRIMARY DATA 32

2.1.2.1 Key insights from industry experts 33

2.1.2.2 Key data from primary sources 33

2.1.2.3 List of primary sources 34

2.1.2.4 Breakdown of primaries 34

FIGURE 4 BREAKDOWN OF PRIMARY INTERVIEWS: BY COMPANY TYPE, DESIGNATION, AND REGION 34

2.1.3 RECESSION IMPACT ANALYSIS 34

2.2 FACTOR ANALYSIS 35

2.2.1 INTRODUCTION 35

2.2.2 DEMAND-SIDE INDICATORS 35

2.2.2.1 Space access 35

2.2.2.2 Global connectivity 35

2.2.2.3 National security 35

2.2.2.4 Reduced travel time 36

2.2.3 SUPPLY-SIDE INDICATORS 36

Scotts International. EU Vat number: PL 6772247784

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

www.scotts-international.com

2.2.3.1	Financial trend of major defense contractors	36
?		
2.3	MARKET SIZE ESTIMATION AND METHODOLOGY	36
2.3.1	BOTTOM-UP APPROACH	36
2.3.1.1	Market size estimation	37
FIGURE 5	MARKET SIZE ESTIMATION METHODOLOGY: BOTTOM-UP APPROACH	38
2.3.2	TOP-DOWN APPROACH	38
FIGURE 6	MARKET SIZE ESTIMATION METHODOLOGY: TOP-DOWN APPROACH	38
2.4	MARKET BREAKDOWN AND DATA TRIANGULATION	39
FIGURE 7	DATA TRIANGULATION	39
2.5	GROWTH RATE ASSUMPTIONS	40
2.6	RESEARCH ASSUMPTIONS	40
FIGURE 8	RESEARCH ASSUMPTIONS	40
2.7	RESEARCH LIMITATIONS	41
2.8	RISK ASSESSMENT	41
3	EXECUTIVE SUMMARY	42
FIGURE 9	MILITARY SEGMENT TO GROW AT HIGHEST CAGR FROM 2023 TO 2030	42
FIGURE 10	PROPULSION SEGMENT TO HAVE LARGEST MARKET SHARE IN 2023	43
FIGURE 11	HYPERSONIC AIRCRAFT SEGMENT TO HAVE HIGHER CAGR DURING FORECAST PERIOD	43
FIGURE 12	NORTH AMERICA TO REGISTER HIGHEST MARKET SHARE DURING FORECAST PERIOD	44
4	PREMIUM INSIGHTS	45
4.1	ATTRACTIVE GROWTH OPPORTUNITIES FOR PLAYERS IN HYPERSONIC FLIGHT MARKET	45
FIGURE 13	RIISING DEMAND FOR SPACE TOURISM AND INCREASED RESPONSE TIME IN MILITARY OPERATIONS TO DRIVE MARKET	45
4.2	HYPERSONIC FLIGHT MARKET, BY INDUSTRY	45
FIGURE 14	SPACE SEGMENT TO LEAD MARKET SHARE DURING FORECAST PERIOD	45
4.3	HYPERSONIC FLIGHT MARKET, BY VEHICLE TYPE	46
FIGURE 15	HYPERSONIC AIRCRAFT SEGMENT TO ACCOUNT FOR LARGEST MARKET SHARE DURING FORECAST PERIOD	46
4.4	HYPERSONIC FLIGHT MARKET, BY END USER	46
FIGURE 16	PROPULSION SEGMENT TO BE DOMINANT DURING FORECAST PERIOD	46
4.5	HYPERSONIC FLIGHT MARKET, BY REGION	47
FIGURE 17	NORTH AMERICA TO HAVE LARGEST MARKET SHARE DURING FORECAST PERIOD	47
4.6	HYPERSONIC FLIGHT MARKET, BY COUNTRY	47
FIGURE 18	CHINA TO BE FASTEST-GROWING MARKET FROM 2023 TO 2030	47
?		
5	MARKET OVERVIEW	48
5.1	INTRODUCTION	48
5.2	MARKET DYNAMICS	49
FIGURE 19	HYPERSONIC FLIGHT MARKET: DRIVERS, RESTRAINTS, OPPORTUNITIES, AND CHALLENGES	49
5.2.1	DRIVERS	49
5.2.1.1	Rising demand for fast and efficient air travel	49
5.2.1.2	Increasing focus on military modernization	50
5.2.1.3	Technological advancements in propulsion systems and aerodynamics	50
5.2.1.4	Growing investments to improve hypersonic technology	50
5.2.1.5	Rising competition in aerospace industry	51
5.2.2	RESTRAINTS	51
5.2.2.1	Costly and complex manufacturing process of hypersonic vehicles	51
5.2.2.2	Complicated operational protocols	52

5.2.2.3	Lack of established regulations and policies	52
5.2.3	OPPORTUNITIES	53
5.2.3.1	International collaboration for research and development projects	53
5.2.3.2	Space tourism	53
5.2.4	CHALLENGES	54
5.2.4.1	Material and heat management	54
5.2.4.2	Lack of fueling infrastructure and specialized launch facilities	54
5.2.4.3	Limited availability of qualified experts on hypersonic technology	55
5.3	TRENDS AND DISRUPTIONS IMPACTING CUSTOMER BUSINESS	55
FIGURE 20	REVENUE SHIFT FOR PLAYERS IN HYPERSONIC FLIGHT MARKET	56
5.4	ECOSYSTEM ANALYSIS	56
5.4.1	PROMINENT COMPANIES	56
5.4.2	PRIVATE AND SMALL ENTERPRISES	56
5.4.3	END USERS	57
FIGURE 21	ECOSYSTEM MAPPING	57
TABLE 3	ROLE OF COMPANIES IN MARKET ECOSYSTEM	58
5.5	VALUE CHAIN ANALYSIS	59
FIGURE 22	VALUE CHAIN ANALYSIS	59
5.6	USE CASE ANALYSIS	60
5.6.1	IMPROVED ATMOSPHERIC REENTRY FOR HYPERSONIC SPACECRAFT	60
TABLE 4	IMPROVED ATMOSPHERIC REENTRY FOR HYPERSONIC SPACECRAFT	60
5.6.2	EFFICIENT AND RAPID CARGO DELIVERY IN SPACE	61
TABLE 5	EFFICIENT AND RAPID CARGO DELIVERY IN SPACE	61
5.7	PORTER'S FIVE FORCES ANALYSIS	61
TABLE 6	IMPACT OF PORTER'S FIVE FORCES	61
FIGURE 23	PORTER'S FIVE FORCES ANALYSIS	62
5.7.1	THREAT OF NEW ENTRANTS	62
5.7.2	THREAT OF SUBSTITUTES	62
5.7.3	BARGAINING POWER OF SUPPLIERS	62
5.7.4	BARGAINING POWER OF BUYERS	63
5.7.5	INTENSITY OF COMPETITIVE RIVALRY	63
5.8	KEY STAKEHOLDERS AND BUYING CRITERIA	63
5.8.1	KEY STAKEHOLDERS IN BUYING PROCESS	63
FIGURE 24	INFLUENCE OF STAKEHOLDERS ON BUYING PROCESS, BY INDUSTRY	63
TABLE 7	INFLUENCE OF STAKEHOLDERS ON BUYING PROCESS, BY INDUSTRY (%)	64
5.8.2	BUYING CRITERIA	64
FIGURE 25	KEY BUYING CRITERIA, BY INDUSTRY	64
TABLE 8	KEY BUYING CRITERIA, BY INDUSTRY	64
5.9	TARIFF AND REGULATORY LANDSCAPE	65
TABLE 9	NORTH AMERICA: REGULATORY BODIES, GOVERNMENT AGENCIES, AND OTHER AGENCIES	65
TABLE 10	EUROPE: REGULATORY BODIES, GOVERNMENT AGENCIES, AND OTHER AGENCIES	66
TABLE 11	ASIA PACIFIC: REGULATORY BODIES, GOVERNMENT AGENCIES, AND OTHER AGENCIES	67
TABLE 12	MIDDLE EAST: REGULATORY BODIES, GOVERNMENT AGENCIES, AND OTHER AGENCIES	67
TABLE 13	REST OF THE WORLD: REGULATORY BODIES, GOVERNMENT AGENCIES, AND OTHER AGENCIES	68
5.10	KEY CONFERENCES AND EVENTS	68
TABLE 14	KEY CONFERENCES AND EVENTS, 2022-2023	68
6	INDUSTRY TRENDS	69

6.1	INTRODUCTION	69
6.2	TECHNOLOGY TRENDS	69
6.2.1	ADVANCED PROPULSION SYSTEMS	69
6.2.2	THERMAL PROTECTION SYSTEMS	70
6.2.3	MATERIAL SCIENCE	71
6.2.4	AERODYNAMICS AND DESIGN OPTIMIZATION	72
6.2.5	COMPUTATIONAL MODELING AND SIMULATION	73
6.2.6	AUTONOMY AND CONTROL SYSTEMS	74
6.2.7	HYPERSONIC WIND TUNNEL TESTING	75
6.2.8	INTEGRATED AVIONICS AND SENSORS	76
6.2.9	REUSABILITY AND SUSTAINABILITY	77
6.3	IMPACT OF MEGATRENDS	78
6.3.1	GLOBAL GEOPOLITICAL SHIFTS	78
6.3.2	SPACE EXPLORATION AND RESEARCH	79
6.3.3	SOCIETAL ACCEPTANCE AND SAFETY	80
6.4	INNOVATION AND PATENT ANALYSIS	81
TABLE 15	INNOVATIONS AND PATENT REGISTRATIONS, 2019-2023	81
7	HYPERSONIC FLIGHT MARKET, BY INDUSTRY	84
7.1	INTRODUCTION	85
FIGURE 26	HYPERSONIC FLIGHT MARKET, BY INDUSTRY (2023-2030)	85
TABLE 16	HYPERSONIC FLIGHT MARKET, BY INDUSTRY, 2019-2022 (USD MILLION)	85
TABLE 17	HYPERSONIC FLIGHT MARKET, BY INDUSTRY, 2023-2030 (USD MILLION)	85
7.2	MILITARY	86
7.2.1	RIISING INVESTMENT FOR DEVELOPING HYPERSONIC AIRCRAFT TO DRIVE MARKET	86
7.3	SPACE	86
7.3.1	REUSABILITY AND SHORTER RESPONSE TIME OF HYPERSONIC FLIGHTS TO DRIVE MARKET	86
7.4	COMMERCIAL	87
7.4.1	INCREASING DEMAND FOR REDUCED TRAVEL TIME AND ADVANCED CONNECTIVITY TO DRIVE MARKET	87
8	HYPERSONIC FLIGHT MARKET, BY VEHICLE TYPE	88
8.1	INTRODUCTION	89
FIGURE 27	HYPERSONIC FLIGHT MARKET, BY VEHICLE TYPE, 2023-2030	89
TABLE 18	HYPERSONIC FLIGHT MARKET, BY VEHICLE TYPE, 2019-2022 (USD MILLION)	89
TABLE 19	HYPERSONIC FLIGHT MARKET, BY VEHICLE TYPE, 2023-2030 (USD MILLION)	89
8.2	HYPERSONIC AIRCRAFT	90
8.2.1	MILITARY JET	90
8.2.1.1	Rapid response capabilities to drive market	90
8.2.2	COMMERCIAL PLANE	90
8.2.2.1	Increasing air traffic to drive market	90
8.3	HYPERSONIC SPACECRAFT	90
8.3.1	SPACEPLANE	91
8.3.1.1	Demand for space tourism and rapid access to space to drive market	91
8.3.2	AIR-BREATHING HYPERSONIC VEHICLE	91
8.3.2.1	Increased applications in cargo transport to drive market	91
8.3.3	HYPERSONIC TESTBED AND DEMONSTRATOR	91
8.3.3.1	Applications in commercial, space, and military sectors to drive market	91
9	HYPERSONIC FLIGHT MARKET, BY COMPONENT	93
9.1	INTRODUCTION	94

FIGURE 28 HYPersonic FLIGHT MARKET, BY COMPONENT, 2023-2030 94

TABLE 20 HYPersonic FLIGHT MARKET, BY COMPONENT, 2019-2022 (USD MILLION) 94

TABLE 21 HYPersonic FLIGHT MARKET, BY COMPONENT, 2023-2030 (USD MILLION) 94

9.2 PROPULSION 95

9.2.1 RAMJET ENGINE 95

9.2.1.1 Sustained high-speed operation to drive market 95

9.2.2 SCRAMJET ENGINE 95

9.2.2.1 Ability to operate under extremely high temperatures to drive market 95

9.2.3 ROCKET ENGINE 96

9.2.3.1 Higher thrust capability to drive market 96

9.2.4 HYBRID ENGINE 96

9.2.4.1 Dual benefits of air-breathing and rocket propulsion to drive market 96

9.3 AEROSTRUCTURE 96

9.3.1 AIRFRAME STRUCTURE 96

9.3.1.1 Ability to withstand aerodynamic forces and mechanical loads to drive market 96

9.3.2 WING AND CONTROL SURFACE 97

9.3.2.1 Crucial role in stabilizing lift and drag forces to drive market 97

9.3.3 NOSE CONE AND LEADING EDGE 97

9.3.3.1 Improved aerodynamic performance to drive market 97

9.4 AVIONICS 97

9.4.1 FLIGHT CONTROL SYSTEM 97

9.4.1.1 Fault tolerance and trajectory control capabilities to drive market 97

9.4.2 NAVIGATION SYSTEM 98

9.4.2.1 Essential role in precision targeting and payload delivery to drive market 98

9.4.3 COMMUNICATION SYSTEM 98

9.4.3.1 Need for real-time transmission of critical data to drive market 98

9.4.4 THERMAL PROTECTION SYSTEM 98

9.4.4.1 Key role in protecting structural integrity to drive market 98

9.4.5 SENSOR SUIT 99

9.4.5.1 Data collection capabilities to drive market 99

10 HYPersonic FLIGHT MARKET, BY REGION 100

10.1 INTRODUCTION 101

10.2 REGIONAL RECESSION IMPACT ANALYSIS 101

TABLE 22 REGIONAL RECESSION IMPACT ANALYSIS 102

TABLE 23 HYPersonic FLIGHT MARKET, BY REGION, 2019-2022 (USD MILLION) 102

TABLE 24 HYPersonic FLIGHT MARKET, BY REGION, 2023-2030 (USD MILLION) 103

10.3 NORTH AMERICA 103

10.3.1 NORTH AMERICA: PESTLE ANALYSIS 103

10.3.2 NORTH AMERICA: RECESSION IMPACT ANALYSIS 105

FIGURE 29 NORTH AMERICA: HYPersonic FLIGHT MARKET SNAPSHOT 105

TABLE 25 NORTH AMERICA: HYPersonic FLIGHT MARKET, BY INDUSTRY, 2019-2022 (USD MILLION) 106

TABLE 26 NORTH AMERICA: HYPersonic FLIGHT MARKET, BY INDUSTRY, 2023-2030 (USD MILLION) 106

TABLE 27 NORTH AMERICA: HYPersonic FLIGHT MARKET, BY VEHICLE TYPE, 2019-2022 (USD MILLION) 106

TABLE 28 NORTH AMERICA: HYPersonic FLIGHT MARKET, BY VEHICLE TYPE, 2023-2030 (USD MILLION) 106

TABLE 29 NORTH AMERICA: HYPersonic FLIGHT MARKET, BY COMPONENT, 2019-2022 (USD MILLION) 107

TABLE 30 NORTH AMERICA: HYPersonic FLIGHT MARKET, BY COMPONENT, 2023-2030 (USD MILLION) 107

TABLE 31 NORTH AMERICA: HYPersonic FLIGHT MARKET, BY COUNTRY, 2019-2022 (USD MILLION) 107

Scotts International. EU Vat number: PL 6772247784

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

www.scotts-international.com

TABLE 32 NORTH AMERICA: HYPERSONIC FLIGHT MARKET, BY COUNTRY, 2023-2030 (USD MILLION) 107

10.3.3 US 108

10.3.3.1 Robust aerospace industry and investments in hypersonic technology to drive market 108

TABLE 33 US: HYPERSONIC FLIGHT MARKET, BY INDUSTRY, 2019-2022 (USD MILLION) 108

TABLE 34 US: HYPERSONIC FLIGHT MARKET, BY INDUSTRY, 2023-2030 (USD MILLION) 108

TABLE 35 US: HYPERSONIC FLIGHT MARKET, BY VEHICLE TYPE, 2019-2022 (USD MILLION) 108

TABLE 36 US: HYPERSONIC FLIGHT MARKET, BY VEHICLE TYPE, 2023-2030 (USD MILLION) 109

10.3.4 CANADA 109

10.3.4.1 Government interest in development of hypersonic technology to drive market 109

TABLE 37 CANADA: HYPERSONIC FLIGHT MARKET, BY INDUSTRY, 2019-2022 (USD MILLION) 109

TABLE 38 CANADA: HYPERSONIC FLIGHT MARKET, BY INDUSTRY, 2023-2030 (USD MILLION) 109

TABLE 39 CANADA: HYPERSONIC FLIGHT MARKET, BY VEHICLE TYPE, 2019-2022 (USD MILLION) 110

TABLE 40 CANADA: HYPERSONIC FLIGHT MARKET, BY VEHICLE TYPE, 2023-2030 (USD MILLION) 110

10.4 EUROPE 110

10.4.1 EUROPE: PESTLE ANALYSIS 110

10.4.2 EUROPE: RECESSION IMPACT ANALYSIS 112

FIGURE 30 EUROPE: HYPERSONIC FLIGHT MARKET SNAPSHOT 112

TABLE 41 EUROPE: HYPERSONIC FLIGHT MARKET, BY INDUSTRY, 2019-2022 (USD MILLION) 113

TABLE 42 EUROPE: HYPERSONIC FLIGHT MARKET, BY INDUSTRY, 2023-2030 (USD MILLION) 113

TABLE 43 EUROPE: HYPERSONIC FLIGHT MARKET, BY VEHICLE TYPE, 2019-2022 (USD MILLION) 113

TABLE 44 EUROPE: HYPERSONIC FLIGHT MARKET, BY VEHICLE TYPE, 2023-2030 (USD MILLION) 113

TABLE 45 EUROPE: HYPERSONIC FLIGHT MARKET, BY COMPONENT, 2019-2022 (USD MILLION) 114

TABLE 46 EUROPE: HYPERSONIC FLIGHT MARKET, BY COMPONENT, 2023-2030 (USD MILLION) 114

TABLE 47 EUROPE: HYPERSONIC FLIGHT MARKET, BY COUNTRY, 2019-2022 (USD MILLION) 114

TABLE 48 EUROPE: HYPERSONIC FLIGHT MARKET, BY COUNTRY, 2023-2030 (USD MILLION) 114

10.4.3 UK 115

10.4.3.1 Projects and collaborations by Ministry of Defence to drive market 115

TABLE 49 UK: HYPERSONIC FLIGHT MARKET, BY INDUSTRY, 2019-2022 (USD MILLION) 115

TABLE 50 UK: HYPERSONIC FLIGHT MARKET, BY INDUSTRY, 2023-2030 (USD MILLION) 115

TABLE 51 UK: HYPERSONIC FLIGHT MARKET, BY VEHICLE TYPE, 2019-2022 (USD MILLION) 115

TABLE 52 UK: HYPERSONIC FLIGHT MARKET, BY VEHICLE TYPE, 2023-2030 (USD MILLION) 116

10.4.4 FRANCE 116

10.4.4.1 Initiatives by ONERA to drive market 116

TABLE 53 FRANCE: HYPERSONIC FLIGHT MARKET, BY INDUSTRY, 2019-2022 (USD MILLION) 116

TABLE 54 FRANCE: HYPERSONIC FLIGHT MARKET, BY INDUSTRY, 2023-2030 (USD MILLION) 116

TABLE 55 FRANCE: HYPERSONIC FLIGHT MARKET, BY VEHICLE TYPE, 2019-2022 (USD MILLION) 117

TABLE 56 FRANCE: HYPERSONIC FLIGHT MARKET, BY VEHICLE TYPE, 2023-2030 (USD MILLION) 117

10.4.5 GERMANY 117

10.4.5.1 Space exploration missions to drive market 117

TABLE 57 GERMANY: HYPERSONIC FLIGHT MARKET, BY INDUSTRY, 2019-2022 (USD MILLION) 118

TABLE 58 GERMANY: HYPERSONIC FLIGHT MARKET, BY INDUSTRY, 2023-2030 (USD MILLION) 118

TABLE 59 GERMANY: HYPERSONIC FLIGHT MARKET, BY VEHICLE TYPE, 2019-2022 (USD MILLION) 118

TABLE 60 GERMANY: HYPERSONIC FLIGHT MARKET, BY VEHICLE TYPE, 2023-2030 (USD MILLION) 118

10.4.6 REST OF EUROPE 119

TABLE 61 REST OF EUROPE: HYPERSONIC FLIGHT MARKET, BY INDUSTRY, 2019-2022 (USD MILLION) 119

TABLE 62 REST OF EUROPE: HYPERSONIC FLIGHT MARKET, BY INDUSTRY, 2023-2030 (USD MILLION) 119

TABLE 63 REST OF EUROPE: HYPERSONIC FLIGHT MARKET, BY VEHICLE TYPE, 2019-2022 (USD MILLION) 119

Scotts International. EU Vat number: PL 6772247784

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

www.scotts-international.com

TABLE 64	REST OF EUROPE: HYPERSONIC FLIGHT MARKET, BY VEHICLE TYPE, 2023-2030 (USD MILLION)	120
10.5	ASIA PACIFIC	120
10.5.1	ASIA PACIFIC: PESTLE ANALYSIS	120
10.5.2	ASIA PACIFIC: RECESSION IMPACT ANALYSIS	121
FIGURE 31	ASIA PACIFIC: HYPERSONIC FLIGHT MARKET SNAPSHOT	122
TABLE 65	ASIA PACIFIC: HYPERSONIC FLIGHT MARKET, BY INDUSTRY, 2019-2022 (USD MILLION)	123
TABLE 66	ASIA PACIFIC: HYPERSONIC FLIGHT MARKET, BY INDUSTRY, 2023-2030 (USD MILLION)	123
TABLE 67	ASIA PACIFIC: HYPERSONIC FLIGHT MARKET, BY VEHICLE TYPE, 2019-2022 (USD MILLION)	123
TABLE 68	ASIA PACIFIC: HYPERSONIC FLIGHT MARKET, BY VEHICLE TYPE, 2023-2030 (USD MILLION)	123
TABLE 69	ASIA PACIFIC: HYPERSONIC FLIGHT MARKET, BY COMPONENT, 2019-2022 (USD MILLION)	124
TABLE 70	ASIA PACIFIC: HYPERSONIC FLIGHT MARKET, BY COMPONENT, 2023-2030 (USD MILLION)	124
TABLE 71	ASIA PACIFIC: HYPERSONIC FLIGHT MARKET, BY COUNTRY, 2019-2022 (USD MILLION)	124
TABLE 72	ASIA PACIFIC: HYPERSONIC FLIGHT MARKET, BY COUNTRY, 2023-2030 (USD MILLION)	124
10.5.3	CHINA	125
10.5.3.1	Increased testing and development of hypersonic vehicles to drive market	125
TABLE 73	CHINA: HYPERSONIC FLIGHT MARKET, BY INDUSTRY, 2019-2022 (USD MILLION)	125
TABLE 74	CHINA: HYPERSONIC FLIGHT MARKET, BY INDUSTRY, 2023-2030 (USD MILLION)	125
TABLE 75	CHINA: HYPERSONIC FLIGHT MARKET, BY VEHICLE TYPE, 2019-2022 (USD MILLION)	126
TABLE 76	CHINA: HYPERSONIC FLIGHT MARKET, BY VEHICLE TYPE, 2023-2030 (USD MILLION)	126
10.5.4	JAPAN	126
10.5.4.1	National research and development programs to drive market	126
TABLE 77	JAPAN: HYPERSONIC FLIGHT MARKET, BY INDUSTRY, 2019-2022 (USD MILLION)	126
TABLE 78	JAPAN: HYPERSONIC FLIGHT MARKET, BY INDUSTRY, 2023-2030 (USD MILLION)	127
TABLE 79	JAPAN: HYPERSONIC FLIGHT MARKET, BY VEHICLE TYPE, 2019-2022 (USD MILLION)	127
TABLE 80	JAPAN: HYPERSONIC FLIGHT MARKET, BY VEHICLE TYPE, 2023-2030 (USD MILLION)	127
10.5.5	REST OF ASIA PACIFIC	127
TABLE 81	REST OF ASIA PACIFIC: HYPERSONIC FLIGHT MARKET, BY INDUSTRY, 2019-2022 (USD MILLION)	128
TABLE 82	REST OF ASIA PACIFIC: HYPERSONIC FLIGHT MARKET, BY INDUSTRY, 2023-2030 (USD MILLION)	128
TABLE 83	REST OF ASIA PACIFIC: HYPERSONIC FLIGHT MARKET, BY VEHICLE TYPE, 2019-2022 (USD MILLION)	128
TABLE 84	REST OF ASIA PACIFIC: HYPERSONIC FLIGHT MARKET, BY VEHICLE TYPE, 2023-2030 (USD MILLION)	128
10.6	REST OF THE WORLD	129
TABLE 85	REST OF THE WORLD: HYPERSONIC FLIGHT MARKET, BY INDUSTRY, 2019-2022 (USD MILLION)	129
TABLE 86	REST OF THE WORLD: HYPERSONIC FLIGHT MARKET, BY INDUSTRY, 2023-2030 (USD MILLION)	129
TABLE 87	REST OF THE WORLD: HYPERSONIC FLIGHT MARKET, BY VEHICLE TYPE, 2019-2022 (USD MILLION)	129
TABLE 88	REST OF THE WORLD: HYPERSONIC FLIGHT MARKET, BY VEHICLE TYPE, 2023-2030 (USD MILLION)	130
TABLE 89	REST OF THE WORLD: HYPERSONIC FLIGHT MARKET, BY COMPONENT, 2019-2022 (USD MILLION)	130
TABLE 90	REST OF THE WORLD: HYPERSONIC FLIGHT MARKET, BY COMPONENT, 2023-2030 (USD MILLION)	130
TABLE 91	REST OF THE WORLD: HYPERSONIC FLIGHT MARKET, BY REGION, 2019-2022 (USD MILLION)	130
TABLE 92	REST OF THE WORLD: HYPERSONIC FLIGHT MARKET, BY REGION, 2023-2030 (USD MILLION)	131
10.6.1	MIDDLE EAST & AFRICA	131
10.6.1.1	Growing applications of hypersonic technology in logistics and defense to drive market	131
TABLE 93	MIDDLE EAST & AFRICA: HYPERSONIC FLIGHT MARKET, BY INDUSTRY, 2019-2022 (USD MILLION)	131
TABLE 94	MIDDLE EAST & AFRICA: HYPERSONIC FLIGHT MARKET, BY INDUSTRY, 2023-2030 (USD MILLION)	132
TABLE 95	MIDDLE EAST & AFRICA: HYPERSONIC FLIGHT MARKET, BY VEHICLE TYPE, 2019-2022 (USD MILLION)	132
TABLE 96	MIDDLE EAST & AFRICA: HYPERSONIC FLIGHT MARKET, BY VEHICLE TYPE, 2023-2030 (USD MILLION)	132
10.6.2	LATIN AMERICA	132
10.6.2.1	Increasing focus on boosting defense capabilities to drive market	132

Scotts International. EU Vat number: PL 6772247784

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

www.scotts-international.com

TABLE 97	LATIN AMERICA: HYPERSONIC FLIGHT MARKET, BY INDUSTRY, 2019-2022 (USD MILLION)	133
TABLE 98	LATIN AMERICA: HYPERSONIC FLIGHT MARKET, BY INDUSTRY, 2023-2030 (USD MILLION)	133
TABLE 99	LATIN AMERICA: HYPERSONIC FLIGHT MARKET, BY VEHICLE TYPE, 2019-2022 (USD MILLION)	133
TABLE 100	LATIN AMERICA: HYPERSONIC FLIGHT MARKET, BY VEHICLE TYPE, 2023-2030 (USD MILLION)	133
11	COMPETITIVE LANDSCAPE	134
11.1	INTRODUCTION	134
TABLE 101	KEY DEVELOPMENTS IN HYPERSONIC FLIGHT MARKET, 2019-2022	134
11.2	RANKING ANALYSIS, 2022	136
FIGURE 32	RANKING ANALYSIS, 2022	136
11.3	COMPANY EVALUATION MATRIX	138
11.3.1	STARS	138
11.3.2	EMERGING LEADERS	138
11.3.3	PERVASIVE PLAYERS	138
11.3.4	PARTICIPANTS	138
FIGURE 33	COMPANY EVALUATION MATRIX, 2022	139
11.3.5	COMPANY FOOTPRINT	140
TABLE 102	COMPANY FOOTPRINT	140
TABLE 103	COMPANY FOOTPRINT, BY INDUSTRY	141
TABLE 104	COMPANY FOOTPRINT, BY COMPONENT	142
TABLE 105	COMPANY FOOTPRINT, BY REGION	143
11.4	STARTUP/SME EVALUATION MATRIX	144
11.4.1	PROGRESSIVE COMPANIES	144
11.4.2	RESPONSIVE COMPANIES	144
11.4.3	DYNAMIC COMPANIES	144
11.4.4	STARTING BLOCKS	144
FIGURE 34	STARTUP/SME EVALUATION MATRIX, 2022	145
11.4.5	COMPETITIVE BENCHMARKING	146
TABLE 106	DETAILED LIST OF KEY STARTUPS/SMES	146
TABLE 107	COMPETITIVE BENCHMARKING OF KEY STARTUPS/SMES	147
11.5	COMPETITIVE SCENARIO	147
11.5.1	MARKET EVALUATION FRAMEWORK	147
11.5.2	DEALS	148
TABLE 108	DEALS, 2019-2023	148
12	COMPANY PROFILES	150
12.1	KEY PLAYERS	150
	(Business Overview, Products Offered, Recent Developments, and MnM View (Key strengths/Right to Win, Strategic Choices Made, and Weaknesses and Competitive Threats))*	
12.1.1	LEIDOS	150
TABLE 109	LEIDOS: COMPANY OVERVIEW	150
FIGURE 35	LEIDOS: COMPANY SNAPSHOT	151
TABLE 110	LEIDOS: PRODUCTS/SOLUTIONS/SERVICES OFFERED	151
TABLE 111	LEIDOS: DEALS	152
12.1.2	ROLLS-ROYCE	154
TABLE 112	ROLLS-ROYCE: COMPANY OVERVIEW	154
FIGURE 36	ROLLS-ROYCE: COMPANY SNAPSHOT	154
TABLE 113	ROLLS-ROYCE: PRODUCTS/SOLUTIONS/SERVICES OFFERED	155
TABLE 114	ROLLS-ROYCE: DEALS	155

12.1.3	HERMEUS CORPORATION	157
TABLE 115	HERMEUS CORPORATION: COMPANY OVERVIEW	157
TABLE 116	HERMEUS CORPORATION: PRODUCTS/SOLUTIONS/SERVICES OFFERED	157
TABLE 117	HERMEUS CORPORATION: DEALS	157
12.1.4	NORTHROP GRUMMAN CORPORATION	159
TABLE 118	NORTHROP GRUMMAN CORPORATION: COMPANY OVERVIEW	159
FIGURE 37	NORTHROP GRUMMAN CORPORATION: COMPANY SNAPSHOT	159
TABLE 119	NORTHROP GRUMMAN CORPORATION: PRODUCTS/SOLUTIONS/SERVICES OFFERED	160
12.1.5	RAYTHEON TECHNOLOGIES CORPORATION	161
TABLE 120	RAYTHEON TECHNOLOGIES CORPORATION: COMPANY OVERVIEW	161
FIGURE 38	RAYTHEON TECHNOLOGIES CORPORATION: COMPANY SNAPSHOT	162
TABLE 121	RAYTHEON TECHNOLOGIES CORPORATION: PRODUCTS/SOLUTIONS/SERVICES OFFERED	162
12.1.6	LOCKHEED MARTIN CORPORATION	164
TABLE 122	LOCKHEED MARTIN CORPORATION: COMPANY OVERVIEW	164
FIGURE 39	LOCKHEED MARTIN CORPORATION: COMPANY SNAPSHOT	165
TABLE 123	LOCKHEED MARTIN CORPORATION: PRODUCTS/SOLUTIONS/SERVICES OFFERED	165
12.1.7	BAE SYSTEMS PLC	166
TABLE 124	BAE SYSTEMS PLC: COMPANY OVERVIEW	166
FIGURE 40	BAE SYSTEMS PLC: COMPANY SNAPSHOT	166
TABLE 125	BAE SYSTEMS PLC: PRODUCTS/SOLUTIONS/SERVICES OFFERED	167
TABLE 126	BAE SYSTEMS PLC: DEALS	167
12.1.8	L3HARRIS TECHNOLOGIES, INC.	168
TABLE 127	L3HARRIS TECHNOLOGIES, INC.: COMPANY OVERVIEW	168
FIGURE 41	L3HARRIS TECHNOLOGIES, INC.: COMPANY SNAPSHOT	168
TABLE 128	L3HARRIS TECHNOLOGIES, INC.: PRODUCTS/SOLUTIONS/SERVICES OFFERED	169
12.1.9	KRATOS DEFENSE & SECURITY SOLUTIONS, INC.	170
TABLE 129	KRATOS DEFENSE & SECURITY SOLUTIONS, INC.: COMPANY OVERVIEW	170
FIGURE 42	KRATOS DEFENSE & SECURITY SOLUTIONS, INC.: COMPANY SNAPSHOT	171
TABLE 130	KRATOS DEFENSE & SECURITY SOLUTIONS, INC.: PRODUCTS/SOLUTIONS/ SERVICES OFFERED	171
TABLE 131	KRATOS DEFENSE & SECURITY SOLUTIONS, INC.: DEALS	172
12.1.10	THE BOEING COMPANY	173
TABLE 132	THE BOEING COMPANY: COMPANY OVERVIEW	173
FIGURE 43	THE BOEING COMPANY: COMPANY SNAPSHOT	173
TABLE 133	THE BOEING COMPANY: PRODUCTS/SOLUTIONS/SERVICES OFFERED	174
12.1.11	SPACEX	175
TABLE 134	SPACEX: COMPANY OVERVIEW	175
TABLE 135	SPACEX: PRODUCTS/SOLUTIONS/SERVICES OFFERED	175
12.1.12	ROCKET LAB USA	176
TABLE 136	ROCKET LAB USA: COMPANY OVERVIEW	176
TABLE 137	ROCKET LAB USA: PRODUCTS/SOLUTIONS/SERVICES OFFERED	176
TABLE 138	ROCKET LAB USA: DEALS	176
12.1.13	DASSAULT AVIATION	177
TABLE 139	DASSAULT AVIATION: COMPANY OVERVIEW	177
TABLE 140	DASSAULT AVIATION: PRODUCTS/SOLUTIONS/SERVICES OFFERED	177
12.1.14	DLR	178
TABLE 141	DLR: COMPANY OVERVIEW	178
TABLE 142	DLR: PRODUCTS/SOLUTIONS/SERVICES OFFERED	178

12.1.15	BLUE ORIGIN	179
TABLE 143	BLUE ORIGIN: COMPANY OVERVIEW	179
TABLE 144	BLUE ORIGIN: PRODUCTS/SOLUTIONS/SERVICES OFFERED	179
TABLE 145	BLUE ORIGIN: DEALS	179
12.1.16	GENERAL ELECTRIC GROUP	180
TABLE 146	GENERAL ELECTRIC GROUP: COMPANY OVERVIEW	180
FIGURE 44	GENERAL ELECTRIC GROUP: COMPANY SNAPSHOT	181
TABLE 147	GENERAL ELECTRIC GROUP: PRODUCTS/SOLUTIONS/SERVICES OFFERED	181
12.2	OTHER PLAYERS	182
12.2.1	REACTION ENGINES	182
TABLE 148	REACTION ENGINES: COMPANY OVERVIEW	182
12.2.2	STRATOLAUNCH	183
TABLE 149	STRATOLAUNCH: COMPANY OVERVIEW	183
12.2.3	HYPERSONIX LAUNCH SYSTEMS	184
TABLE 150	HYPERSONIX LAUNCH SYSTEMS: COMPANY OVERVIEW	184
12.2.4	HYPERSPACE PROPULSION	185
TABLE 151	HYPERSPACE PROPULSION: COMPANY OVERVIEW	185
12.2.5	VENUS AEROSPACE	185
TABLE 152	VENUS AEROSPACE: COMPANY OVERVIEW	185
12.2.6	DESTINUS	186
TABLE 153	DESTINUS: COMPANY OVERVIEW	186
12.2.7	SIERRA NEVADA CORPORATION	186
TABLE 154	SIERRA NEVADA CORPORATION: COMPANY OVERVIEW	186
12.2.8	CHINA AEROSPACE SCIENCE AND TECHNOLOGY CORPORATION	187
TABLE 155	CHINA AEROSPACE SCIENCE AND TECHNOLOGY CORPORATION: COMPANY OVERVIEW	187
12.2.9	VELONTRA	188
TABLE 156	VELONTRA: COMPANY OVERVIEW	188
*Details on Business Overview, Products Offered, Recent Developments, and MnM View (Key strengths/Right to Win, Strategic Choices Made, and Weaknesses and Competitive Threats) might not be captured in case of unlisted companies.		
13	APPENDIX	189
13.1	DISCUSSION GUIDE	189
13.2	KNOWLEDGESTORE: MARKETSandMARKETS' SUBSCRIPTION PORTAL	192
13.3	CUSTOMIZATION OPTIONS	194
13.4	RELATED REPORTS	194
13.5	AUTHOR DETAILS	195

Hypersonic Flight Market by Vehicle Type (Hypersonic Aircraft, Hypersonic Spacecraft), Industry (Military, Space, Commercial), Component (Propulsion, Aerostructure, Avionics) and Region (North America, Europe, APAC, RoW) - Global forecast to 2030

Market Report | 2023-11-07 | 189 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"/>

Scotts International. EU Vat number: PL 6772247784

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

www.scotts-international.com

Zip Code*	<input type="text"/>	Country*	<input type="text"/>
		Date	2025-05-20
		Signature	<div></div>