

## **Military Fixed-wing Aircraft - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts 2016 - 2029**

Market Report | 2024-02-17 | 90 pages | Mordor Intelligence

### **AVAILABLE LICENSES:**

- Single User License \$4750.00
- Team License (1-7 Users) \$5250.00
- Site License \$6500.00
- Corporate License \$8750.00

### **Report description:**

The Military Fixed-wing Aircraft Market size is estimated at USD 41.77 billion in 2024, and is expected to reach USD 63.74 billion by 2029, growing at a CAGR of 8.82% during the forecast period (2024-2029).

#### Key Highlights

- Largest Market by Body Type - Multi-Role Aircraft : Their air superiority, ability to suppress enemy air defenses and perform air strikes, and use in electronic warfare missions are driving the procurement of advanced multi-role aircraft.
- Largest Market by Region - North America : Various ongoing military modernization programs aimed at procuring advanced aircraft across the region are anticipated to drive the market's growth.
- Largest Market by Country - United States : The United States is focusing on procuring more advanced fighter jets to maintain its military supremacy, thus supporting the growth of the military fixed-wing aircraft market.

#### Military Fixed-Wing Aircraft Market Trends

Multi-Role Aircraft is the largest Body Type

- The multi-role aircraft segment accounts for a major share in terms of revenue and volume as all the regions are investing heavily in the modernization of their aging military fixed-wing aircraft fleet and procuring next-generation aircraft.
- The training and transport aircraft segments may also show healthy growth between 2022 and 2028, as the countries are looking to procure newer generation aircraft to replace some of the old aircraft models that have been operational for over several

**Scotts International. EU Vat number: PL 6772247784**

tel. 0048 603 394 346 e-mail: [support@scotts-international.com](mailto:support@scotts-international.com)

[www.scotts-international.com](http://www.scotts-international.com)

decades.

- The others segment includes special mission platforms that serve as "force multipliers" and constitute a respectable segment in the military aviation market. Business jets or regional transport aircraft are being converted for special missions due to lower acquisition and operating costs. North America is expected to majorly drive the growth of this segment.
- Some of the major ongoing and future procurements of military fixed-wing aircraft include Germany's procurement of the F-35 from Lockheed Martin, which is likely to be delivered in 2026. The company also anticipates further orders for the aircraft in Europe, with Greece and the Czech Republic showing strong interest in the technologically advanced F-35.
- In December 2021, the United Arab Emirates made a deal with Dassault Aviation to purchase 80 Rafale F4 fighter jets for the UAE Air Force and Air Defence (UAE AF & AD). In May 2021, Egypt signed a contract with France to purchase 30 Rafale fighter jets in a deal valued at USD 4.5 billion.

#### North America is the largest Region

- The fixed-wing aircraft accounted for around 60% of the global military aircraft fleet in 2021. The international security horizon in the second half of 2021 was marked by escalating conflicts and geopolitical and border issues, with major confrontations such as between Russia and Ukraine and India and China, and other nations in Asia-Pacific. The armed conflicts and internal security aided in a surge of defense expenditures globally, with nations strengthening their armed forces with new procurements of fixed-wing aircraft.
- The world defense expenditure crossed over USD 2 trillion in 2021, with major military powers such as the United States increased their defense budget by 3%, from USD 778 billion in 2020 to over USD 800 billion in 2021. Because of which, the North America region is expected to be the largest across the world. The United States was followed by China, India, Russia, and the United Kingdom, which also increased their defense expenditure by 14%, 5%, 6.8%, and 13%, respectively.
- In 2022, the war between Russia and Ukraine further fueled the need to reassess the operational readiness of the armed forces globally. NATO nations are undergoing fleet modernization and expansion programs with the procurement of new fixed-wing aircraft.
- The active fleet of fixed-wing aircraft surged by around 1% from 2016 to 2021. Asia-Pacific and the Middle East are the major regions with a growth of 7% and 5%, respectively, in their active fixed-wing aircraft fleet. With the expansion of aircraft fleet, the global fixed-wing aircraft market is expected to increase during 2022-2028.

#### Military Fixed-Wing Aircraft Industry Overview

The Military Fixed-wing Aircraft Market is fairly consolidated, with the top five companies occupying 81.11%. The major players in this market are Airbus SE, Aviation Industry Corporation of China, Ltd, Dassault Aviation, Lockheed Martin Corporation and The Boeing Company (sorted alphabetically).

#### Additional Benefits:

- The market estimate (ME) sheet in Excel format
- 3 months of analyst support

#### Table of Contents:

##### 1 EXECUTIVE SUMMARY & KEY FINDINGS

**Scotts International. EU Vat number: PL 6772247784**

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

www.scotts-international.com

## 2 REPORT OFFERS

## 3 INTRODUCTION

### 3.1 Study Assumptions & Market Definition

### 3.2 Scope of the Study

### 3.3 Research Methodology

## 4 KEY INDUSTRY TRENDS

### 4.1 Gross Domestic Product

### 4.2 Active Fleet Data

### 4.3 Defense Spending

### 4.4 Regulatory Framework

### 4.5 Value Chain Analysis

## 5 MARKET SEGMENTATION

### 5.1 Body Type

#### 5.1.1 Multi-Role Aircraft

#### 5.1.2 Training Aircraft

#### 5.1.3 Transport Aircraft

#### 5.1.4 Others

### 5.2 Region

#### 5.2.1 Asia-Pacific

##### 5.2.1.1 Australia

##### 5.2.1.2 China

##### 5.2.1.3 India

##### 5.2.1.4 Indonesia

##### 5.2.1.5 Japan

##### 5.2.1.6 Malaysia

##### 5.2.1.7 Philippines

##### 5.2.1.8 Singapore

##### 5.2.1.9 South Korea

##### 5.2.1.10 Thailand

##### 5.2.1.11 Rest Of Asia-Pacific

#### 5.2.2 Europe

##### 5.2.2.1 France

##### 5.2.2.2 Germany

##### 5.2.2.3 Italy

##### 5.2.2.4 Netherlands

##### 5.2.2.5 Russia

##### 5.2.2.6 Spain

##### 5.2.2.7 UK

##### 5.2.2.8 Rest Of Europe

#### 5.2.3 Middle East And Africa

##### 5.2.3.1 Algeria

##### 5.2.3.2 Egypt

##### 5.2.3.3 Qatar

##### 5.2.3.4 Saudi Arabia

**Scotts International. EU Vat number: PL 6772247784**

tel. 0048 603 394 346 e-mail: [support@scotts-international.com](mailto:support@scotts-international.com)

[www.scotts-international.com](http://www.scotts-international.com)

- 5.2.3.5 South Africa
- 5.2.3.6 Turkey
- 5.2.3.7 United Arab Emirates
- 5.2.3.8 Rest Of Middle East And Africa
- 5.2.4 North America
  - 5.2.4.1 Canada
  - 5.2.4.2 Mexico
  - 5.2.4.3 United States
  - 5.2.4.4 Rest Of North America
- 5.2.5 South America
  - 5.2.5.1 Brazil
  - 5.2.5.2 Chile
  - 5.2.5.3 Colombia
  - 5.2.5.4 Rest Of South America

## 6 COMPETITIVE LANDSCAPE

- 6.1 Key Strategic Moves
- 6.2 Market Share Analysis
- 6.3 Company Landscape
- 6.4 Company Profiles
  - 6.4.1 Airbus SE
  - 6.4.2 Aviation Industry Corporation of China, Ltd
  - 6.4.3 Dassault Aviation
  - 6.4.4 Korea Aerospace Industries
  - 6.4.5 Lockheed Martin Corporation
  - 6.4.6 Pakistan Aeronautical Complex (PAC)
  - 6.4.7 Pilatus Aircraft Ltd
  - 6.4.8 The Boeing Company
  - 6.4.9 Turkish Aerospace Industries
  - 6.4.10 United Aircraft Corporation

## 7 KEY STRATEGIC QUESTIONS FOR AVIATION CEOS

## 8 APPENDIX

- 8.1 Global Overview
  - 8.1.1 Overview
  - 8.1.2 Porter's Five Forces Framework
  - 8.1.3 Global Value Chain Analysis
  - 8.1.4 Market Dynamics (DROs)
- 8.2 Sources & References
- 8.3 List of Tables & Figures
- 8.4 Primary Insights
- 8.5 Data Pack
- 8.6 Glossary of Terms

**Scotts International. EU Vat number: PL 6772247784**

tel. 0048 603 394 346 e-mail: [support@scotts-international.com](mailto:support@scotts-international.com)

[www.scotts-international.com](http://www.scotts-international.com)

## Military Fixed-wing Aircraft - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts 2016 - 2029

Market Report | 2024-02-17 | 90 pages | Mordor Intelligence

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 License      | \$4750.00 |
|                | Team License (1-7 Users) | \$5250.00 |
|                | Site License             | \$6500.00 |
|                | Corporate License        | \$8750.00 |
|                |                          | 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"/> |
|               |                      | Date                          | 2026-03-02           |
|               |                      | Signature                     |                      |

**Scotts International. EU Vat number: PL 6772247784**

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

www.scotts-international.com



**Scotts International. EU Vat number: PL 6772247784**

tel. 0048 603 394 346 e-mail: [support@scotts-international.com](mailto:support@scotts-international.com)  
[www.scotts-international.com](http://www.scotts-international.com)