

## **North America Military Aviation - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts 2016 - 2029**

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### **Report description:**

The North America Military Aviation Market size is estimated at USD 18.96 billion in 2024, and is expected to reach USD 25.57 billion by 2029, growing at a CAGR of 6.16% during the forecast period (2024-2029).

#### Key Highlights

- Fixed-Wing Aircraft is the Largest Sub Aircraft Type : There is an increased need to maintain military supremacy and enhance their combat capabilities by procuring advanced combat aircraft across all countries in the region.
- Fixed-Wing Aircraft is the Fastest-growing Sub Aircraft Type : Ongoing geopolitical tensions and conflicts across the world are leading the region to procure advanced multi-role aircraft to enhance its combat superiority.
- Multi-Role Aircraft is the Largest Body Type : Countries in the region are opting for multi-role aircraft to perform ground strikes and suppress the enemy air defenses. The aircraft also offers air superiority.
- United States is the Largest Country : The country's focus on procuring more advanced aircraft to maintain its military supremacy supports the growth of the region's military helicopters market.

#### North America Military Aviation Market Trends

Fixed-Wing Aircraft is the largest Sub Aircraft Type

- The North American military aviation market is segmented by aircraft type into fixed-wing and rotorcraft. Geopolitical conflicts, the rising threat of terrorism and war, and the modernization plan to replace the aging military aircraft played a major role in the

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procurement of newer generation military aircraft. The delivery of military aircraft in North America was delayed in 2020 due to the COVID-19 pandemic. The United States increased its defense spending to USD 801 billion in 2021 despite the pandemic's impact.

- In North America, during 2016-2021, fixed-wing aircraft accounted for a share of 77.6% and rotorcraft for 22.4% in terms of value. The United States had the highest contribution in both the fixed-wing aircraft and rotorcraft segments, with 79.8% and 20.2%, respectively. Canada accounted for 24.1% (fixed-wing aircraft) and 75.1% (rotorcraft), while Mexico accounted for 12.3% (fixed-wing aircraft) and 87.7% (rotorcraft).
- The procurement plans to replace the aging aircraft fleet by the US and Canadian armed forces with fighter jets, large transport aircraft, and special-mission aircraft may drive the growth of the fixed-wing aircraft segment between 2022 and 2028.
- In 2021, the US Air Force collaborated with Lockheed Martin to construct a new manufacturing line to manufacture the F-16 Block 70/72 fighter aircraft. This collaboration was done to accommodate the increased demand for the new F-16 Fighting Falcons from partner nations. Canada and Mexico have an active fleet of 380 and 469, with an order of 105 (88 optional) and 11, respectively. Similar potential procurement initiatives are anticipated to drive the aviation market in North America during the forecast period.

United States is the largest Country

- The defense expenditure of the North American region in 2021 surged by around 3.2% from 2020 to USD 838.1 billion. Geopolitical tensions, the need for aircraft fleet modernization, and the aim to achieve aerial supremacy drive the demand for advanced fixed-wing aircraft and rotorcraft.
- Countries in North America, particularly the United States, have been among the first to develop advanced aircraft assets to counter geopolitical conflicts. Nearly 94% of the military expenditures in the Americas region come from North America. North America's military expenditures are largely accounted for by the United States with 95.54%, followed by Mexico and Canada with 1.04% and 3.16%, respectively, in 2021. The rest of North America accounted for only 0.26% of the total North American defense spending in 2021.
- The US had an active fleet size of 13,246 aircraft as of December 2021. Out of these, more than 56.8% of the fleet comprises fixed-wing aircraft, while the remaining are rotorcraft. Canada had an active fleet of about 380 aircraft, and Mexico had an active fleet of 469 aircraft as of December 2021. Combat fixed-wing aircraft occupied 36% of the active fixed-wing military aircraft fleet by the end of 2021.
- With the ongoing procurements and modernization plans, the US will continue to lead the market and generate significant demand for new aircraft. The US also focuses on new aircraft programs by allocating significant funds through R&D for future warfare during the forecast period.

#### North America Military Aviation Industry Overview

The North America Military Aviation Market is fairly consolidated, with the top five companies occupying 98.03%. The major players in this market are Airbus SE, Lockheed Martin Corporation, Northrop Grumman Corporation, Textron Inc. and The Boeing Company (sorted alphabetically).

#### Additional Benefits:

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

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