

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

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Report description:

The North America Military Helicopters Market size is estimated at USD 4.69 billion in 2024, and is expected to decline to USD 4.01 billion by 2029.

Key Highlights

- Multi-Mission Helicopter is the Largest Body Type : Their ability to perform various combat missions is attracting countries to focus more on procuring these helicopters.
- Transport Helicopter is the Fastest-growing Body Type : Their ability to carry troops and equipment to various strategic locations is driving the country to procure transport helicopters.
- United States is the Largest Country : The United States is focusing on procuring more advanced helicopters to maintain its military supremacy, thus supporting the growth of the military helicopters market.

North America Military Helicopters Market Trends

Multi-Mission Helicopter is the largest Body Type

- As of 2021, in terms of the active fleet, the United States accounted for 92% of the total rotorcraft in North America, while Canada, Mexico, and the Rest of North America accounted for 2%, 3%, and 3%, respectively. Over 1,200 attack/reconnaissance rotorcraft (helicopters) are being used by the US Army, including more than 700 AH-64 Apache attack helicopters and over 500 OH-58C Kiowa and OH-58D Kiowa Warrior observation rotorcraft.

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- To improve border security and buy cutting-edge weaponry and technologies, several countries in the region have increased their military budget, which may aid the future expansion of military rotorcraft procurement. In 2022, the United States plans to procure around 95 rotorcraft. In 2023, it plans to procure 119 rotorcraft, including CH-47 Chinook, UH-60 Black Hawk, CH-53K, AH-1Z, and MH-139A.
- In June 2022, the US government signed a five-year contract with Sikorsky for a baseline of 120 H-60M Black Hawk helicopters, with options to reach a total of 255 aircraft to be delivered to the US Army and Foreign Military Sales (FMS) customers.
- The other rotorcraft segment comprise of utility helicopters, training helicopters, reconnaissance helicopters, and among others are also expected to register a growth in terms of new helicopter additions in the future. This is mainly due to the growing demand for utility helicopters from the US Air Force, the US Navy, the US Marine Corps, and the US Army.
- To expand its airspace capabilities and replenish its fleet with the latest technology, the Mexican government ordered 11 combat helicopters (four H225M and seven UH-60M) for its Mexican Air Force.

United States is the largest Country

- The defense expenditure of the North American region surged by around 3.2% from 2020 to USD 838.1 billion in 2021. 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 in the region.
- Countries in North America, particularly the United States, have been among the first to develop advanced helicopters to counter geopolitical conflicts. Nearly 94% of the military expenditures in the Americas region come from North America. North America's military expenditures were 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.
- As of 2021, in terms of active fleet size, North America held 29% of the total rotorcraft worldwide. Out of the entire region, the United States stood first, operating 97% of rotorcraft, of which 38% are multi-mission helicopters, 58% transport helicopters, and 4% other helicopters. The country was followed by Mexico, which operates 2% of fixed-wing aircraft, of which 56% are multi-mission helicopters, 39% transport helicopters, and 31% other helicopters. Mexico was followed by Canada, operating 1% of fixed-wing aircraft, of which 64% are multi-mission helicopters, 21% transport helicopters, and 16% other helicopters.
- With the ongoing procurements and modernization plans, the United States may continue to lead the market and generate significant demand for new rotorcraft. The country may also focus on new rotorcraft programs through R&D for future warfare during the forecast period.

North America Military Helicopters Industry Overview

The North America Military Helicopters Market is fairly consolidated, with the top five companies occupying 100.07%. The major players in this market are Airbus SE, Lockheed Martin Corporation, MD Helicopters LLC., Textron Inc. and The Boeing Company (sorted alphabetically).

Additional Benefits:

- The market estimate (ME) sheet in Excel format

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