

Asia-Pacific Military Aviation - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts (2025 - 2030)

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Report description:

The Asia-Pacific Military Aviation Market size is estimated at 13.23 billion USD in 2025, and is expected to reach 19.31 billion USD by 2030, growing at a CAGR of 7.85% during the forecast period (2025-2030).

The fixed-wing aircraft segment is anticipated to dominate the region's military aircraft procurement, driven by rising military expenditure in fleet expansion

- The Asia-Pacific Combined Military Expenditure (AMCE) amounted to USD 575 billion in 2022. This is a surge of 2.7%. Due to the expansion of the defense industries in East Asian countries, including Japan, South Korea, Taiwan, and Singapore, as well as China and India, defense budgets may continue to rise. Spending on the military in the region increased by more than 2.5%, surpassing that of Africa and the Americas in terms of growth.
- For instance, India and China increased their military expenditures, with India spending over USD 81.4 billion and China spending USD 292 in 2022. Defense spending also increased in Japan by 6% and Indonesia by 1.3% in 2022. The surge in fleet modernization and expansion programs is one of the major drivers of the increased defense expenditure.
- In terms of operational fleet, the region has the largest fleet of aircraft and rotorcraft, with 14,55 aircraft. Out of these, combat aircraft constitute about 4,989 aircraft, along with 519 special purpose aircraft, 48 tankers, 1,022 transport, and 3,094 training aircraft and helicopters. The fixed-wing aircraft segment is anticipated to occupy a major market share in the overall Asia-Pacific military aviation market during the forecast period. The region's market for fighter aircraft is expected to be driven by rising military spending.
- The demand for fighter aircraft in the region is also being fueled by the military modernization program of most Asian nations to replace their outdated fighter aircraft with newer generation aircraft to enhance their aerial combat capabilities. It is expected

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around 2600+ military aircraft are expected to be delivered in the region during 2023-30.

Modernization of defense sector is resulting in an increased demand for military aircraft in the region

- In 2022, Asia-Pacific spent a total of USD 572 billion on military expenditure. Over the past few years, terrorist nations have increased in nations like Afghanistan, Pakistan, India and Philippines. As a result, more anti-terrorism funding is being made available to combat terrorism at the domestic and international levels. In the coming years, the region's economy is expected to be hampered by the ongoing trade wars between China and the United States.
- Territorial disputes in the South China sea and China's dominance over the sea are also prompting various countries such as the Philippines, Indonesia, and Malaysia to spend more on their military equipment.
- During the forecast period, China, India, and South Korea are expected to procure the highest number of aircraft. China is expected to procure around 700 aircraft, including 500 Mi-17 helicopters and 200 J-20 fixed-wing aircraft. South Korea is likely to procure 357 aircraft, including 70 fixed-wing aircraft and 287 helicopters. India is expected to procure around 707 aircraft, including 605 fixed-wing aircraft and 102 rotorcraft.
- Some of the other major procurements in the region are Japan's procurement of 283 aircraft, including 133 fixed-wing aircraft and 150 Bell 412 helicopters. Australia is also expected to procure 118 aircraft, including 85 fixed-wing aircraft and 33 rotorcraft.
- During the forecast period, Thailand, Philippines, Singapore, Malaysia, and Indonesia are projected to procure around 137 aircraft cumulatively. Taiwan is also expected to procure around 60 aircraft, and Pakistan plans to acquire 44 aircraft during the forecast period.

Asia-Pacific Military Aviation Market Trends

Increased border tensions and the need for new aircraft has led to a surge in defense expenditure

- Asia-Pacific spent a total of USD 569 billion on military expenditures. Geopolitical conflicts such as border issues between China and India, internal security challenges, maritime surveillance, and counter-terrorism operations are some of the factors aiding the growth of the fixed-wing aircraft fleet of the countries in this region. The rise in military spending in China and India was the main cause of the increase in 2022. The combined military spending of the two nations in the region in 2022 was 66%. The increase in defense spending of the nations over the past ten years was driven by economic growth and territorial disputes.
- Major military powers, including India, China, Japan, and South Korea, are present in the Asia-Pacific region and are yearly growing their defense budgets. This budget includes a significant portion for the improvement and expansion of air superiority, which is driving the growth of military aviation in the region. For instance, in the budget of FY 2023, the Indian government allocated about 10% more for the Indian Air Force compared to the previous budget, including payments for the new Rafale fighters and the manufacturing of Sukhoi-30MKIs and Tejas fighters.
- The increased military spending in the Asia-Pacific region is intended to gain an advantage in several political and border conflicts, such as the tension in the South China Sea with many regional sovereign entities and border conflicts between India-China and India-Pakistan. The defense spending of major countries in China is expected to cross over USD 400 billion by 2030.

Fleet modernization and new procurements are projected to improve the APAC's military active fleet

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- By the end of 2022, there were 15,543 active aircraft in the Asia-Pacific region, of which fixed-wing aircraft accounted for 60% while rotorcraft accounted for the remaining fleet. China, India, Japan, and South Korea together accounted for 55% of the total active fleet in the region.
- In 2020, the average aircraft fleet age in Asia-Pacific amounted to 9.5 years, which was projected to increase by 2030, when the average aircraft fleet age across the region was expected to be 10.7 years. The older aircraft, some of which date back to the 1960s, have been slowly phased out by the Indian Air Force. The MiG 21 and MiG 27 have been the backbone of the Indian Air Force (IAF). The average age of these aircraft is around 45 years. Australia's two fighter aircraft, FA-18 and F-35, have been in service for the last 16 years and 8 years, respectively.
- Countries such as China, India, and South Korea are expanding their aircraft fleet size to fulfill the demands of modern warfare. They may continue to produce and acquire next-generation aircraft during the forecast period. The regional armed forces are also enhancing the capabilities of helicopters with cutting-edge technology to obtain military superiority over the external threat.
- Asia Pacific's active fleet increased by 3% in 2022 compared to 2017. Indonesia and Thailand accounted for 63% of the total fleet in Southeast Asia. In the coming years, the aircraft fleet may increase as major countries like Thailand, Malaysia, Singapore, Indonesia, and the Philippines plan to procure over 135 aircraft. The active fleet of the region is expected to expand at a healthy rate during the forecast period.

Asia-Pacific Military Aviation Industry Overview

The Asia-Pacific Military Aviation Market is moderately consolidated, with the top five companies occupying 50.79%. The major players in this market are Aviation Industry Corporation of China, Ltd, Dassault Aviation, Hindustan Aeronautics Limited, Lockheed Martin Corporation 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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