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

Market Report | 2025-04-28 | 240 pages | Mordor Intelligence

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Report description:

The Australia Aviation Market size is estimated at 4.14 billion USD in 2025, and is expected to reach 4.46 billion USD by 2030, growing at a CAGR of 1.53% during the forecast period (2025-2030).

Commercial aviation segment is expected to dominate the aviation market in Australia during the forecast period

- The air transportation industry, comprising airlines and its supply chain, is projected to contribute around USD 39 billion of GDP annually to the Australian economy. In all, inputs to the air transport sector and foreign tourists coming by air support more than 2% of the country's GDP. The deliveries in overall aviation witnessed a fall of around 50% in 2020.
- The OEMs experienced problems such as a halt in production to the supply chain and transportation issues due to the lockdown. In commercial aviation, the country's airline companies witnessed a 237% rise in air passenger traffic in 2021, with faster recovery in domestic aviation leading to a surge in the procurement of narrow-body aircraft. During the forecast period, 2022-2028, around 18 commercial aircraft are expected to be delivered to the country. In the General aviation sector, the overall delivery comprising business jet, helicopter, Piston, and Turboprop aircraft surged around 49% during 2019-2021.
- Factors such as the increasing rate of HNWIs, training schools, and the fleet expansion of Charter operators in the country are expected to propel the general aviation sector. The country's defense expenditure surged around 16% from 2020-2021, rising from USD 27.3 billion in 2020 to USD 31.7 billion in 2021. The defense expenditure of the country was 2% of the GDP. The ongoing conflicts and security challenges from China, along with the need to replace the aging fleet, have propelled the procurement of military aircraft in the country.

Australia Aviation Market Trends

The resurgence of domestic and international air travel contributing to the surge in air passenger traffic

- Air passenger traffic in Australia increased by 10% from 2017 to 2022. It surged by around 6% during 2019-2022, exceeding pre-COVID levels. Cairns Regional Airport in Australia experienced a record year-on-year increase in passenger numbers, with an estimated 3.68 million passengers journeying through the airport in the 12-month period ending December 2022. Hobart Regional Airport was the second busiest regional airport, with an estimated 2.29 million passengers arriving and departing in the same period. The increase in passenger numbers was more pronounced than in the year, likely due to a gradual relaxation of travel restrictions following the onset of the coronavirus pandemic.
- In 2021, with travel restrictions reducing within Australia, air passenger traffic improved by around 237% compared to 2020. The recovery in domestic as well as international aviation has aided in passenger growth. The recovery in travel demand of major airlines has resulted in airlines continuing their expected deliveries of aircraft and restructuring their existing fleet by the early retirement of a few aircraft models. For instance, in 2022, major Australian airline Qantas emphasized fleet replacement of its existing fleet. The airlines also plan initial orders for 20 A320neo and 20 Airbus A220 aircraft. It will replace the aging Boeing 737s and 717s used on domestic flights by Qantas and Qantas Links. Deliveries started in mid-2023 and will continue for the next ten years. Thus, the overall air passenger traffic is anticipated to surge during the forecast period.

The increase in defense spending is anticipated to be propelled by a growing number of defense acquisition programs

- The Australian defense expenditure rose by 20% in 2022 compared to USD 27.3 billion in 2017. As a percentage of GDP, the share of defense expenditure in 2022 was 2%. To strengthen its defense cooperation with the US and the Indo-Pacific region, Australia has committed to significant defense technology cooperation with its US counterparts and diversifying its security alliances with other nations, such as Japan, India, and ASEAN countries.
- The surge in defense spending is expected to be driven by increasing acquisition programs. The acquisition budget is primarily likely to increase due to the procurement of aircraft, submarines, naval vessels, and missiles. Australia's defense strategy is based on three strategic defense interests: protecting national security and sea lines of communication, protecting surrounding regions, including Southeast Asia and the South Pacific, and ensuring the security of the Indo-Pacific in a rules-based order. The Asia-Pacific region has become a focal point for Australia, and its military strategy has been developed to protect trade routes.
- The country is facing security challenges from China in the Indo-Pacific region. China's growing influence in the Pacific has forced Australia to increase its defense budget and focus on modernizing its military aircraft fleet. On that note, Australia's defense budget was USD 48.6 billion in 2022-2023 between the Department of Defence and the Australian Signals Directorate. To counter the security challenges, the country increased its defense expenditure over the last two years and invested heavily in fleet modernization and expansion. Australian defense expenditures are expected to surge from 2023 to 2030.

Australia Aviation Industry Overview

The Australia Aviation Market is fairly consolidated, with the top five companies occupying 84.70%. The major players in this market are Airbus SE, Bombardier Inc., General Dynamics Corporation, 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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