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

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Report description:

The Europe Military Aviation Market size is estimated at 13.29 billion USD in 2025, and is expected to reach 13.79 billion USD by 2030, growing at a CAGR of 0.74% during the forecast period (2025-2030).

The Fixed Wing Aircraft Segment Is Expected To Witness Significant Growth

- Europe's defense expenditure surged by around 23% from 2021 to 2022, reaching USD 512 billion in 2022. Military R&D and weaponry purchases accounted for most of the growth in defense expenditure in Europe. The Russia-Ukraine conflict became the center stage in Europe in 2022.
- The armed conflict worsened in March and April 2021, when Russia deployed thousands of troops on its border with Ukraine. In February 2022, a full-fledged war started between the two countries. By the end of March 2022, numerous European NATO member nations had announced plans to increase military expenditures in reaction to the Russian-Ukraine War, aiming to meet or exceed the NATO spending target of 2% of the GDP or higher. In total, 26 of the 27 European NATO nations had available financing for their armed forces in 2022.
- The SIPRI Military Expenditure Database showed that, among the 26 countries, eight spent at least 2% of their GDP on the military in 2022. In the fixed-wing aircraft segment, 40 procurements of Rafale fighter jets by France, 74 F-35 fighter jets by the UK worth USD 4.5 billion, and 15 Eurofighter jets and up to 35 US-made F-35 fighter jets by Germany were some of the major contracts that took place.
- The fixed-wing aircraft segment is expected to witness higher growth due to the increasing procurement of next-generation combat aircraft. The overall military aviation market is also expected to be driven by the military forces' plans to replace their aging aircraft fleet with fighter jets, big transport aircraft, and special-mission aircraft.

- In the rotorcraft segment, more than 1,000 helicopters are expected to be delivered in the region during the forecast period. Most countries are planning to procure multi-mission helicopters to enhance their combat capabilities.

Factors such as fleet modernization and rising geopolitical tensions are driving the market

- Europe has a robust and technologically advanced military helicopter market that is driven by various factors, including geopolitical concerns, modernization efforts, and defense budget allocations. The defense budgets of European countries play a crucial role in shaping the military helicopter market. Despite economic challenges, defense spending has remained a priority for many European nations due to rising security concerns. In 2022, Europe spent USD 480 billion on its military, an increase of 13% over 2021. By the end of March 2022, numerous European NATO member nations announced plans to increase military expenditures in reaction to the Russian invasion of Ukraine in February 2022, aiming to meet or exceed the NATO spending target of 2% of GDP or higher.
- During 2017-2022, in terms of fleet procurement, the region procured 20% of the global total fleet. Of these total fleets, the countries that procured most of the fleet are Italy with 33%, followed by Germany with 20%, France and the UK with 13% each, and Spain with 10%.
- Many European nations are actively engaged in modernizing their military helicopter fleets to meet the evolving security landscape. Upgrading aging platforms with state-of-the-art helicopters enables countries to enhance their operational effectiveness, increase mission versatility, and maintain interoperability with NATO and other allied forces. Germany, France, the United Kingdom, Russia, Italy, Spain, the Netherlands, and the Rest of Europe plan to purchase helicopters from 2023 to 2029. A total of 566 helicopters are expected to be delivered in Europe during the forecast period. During the forecast period, Romania and Hungary also plan to expand their fleet by procuring 60 and 18 helicopters, respectively.

Europe Military Aviation Market Trends

NATO alliances are contributing to the region's defense spending

- In 2022, Europe spent USD 480 billion on its military, a 13% increase over 2021 and a 38% increase over 2013. In 2022, Europe accounted for 21% of the total defense expenditure in the world. In 2021, Central and Western Europe's combined military expenditure totaled USD 345 billion (USD 305 billion for Western Europe and USD 45 billion for Central Europe), including most NATO allies and all of the EU member states.
- Increased expenditures on military R&D and arms purchases were the main drivers of the surge in military spending in Central and Western Europe. In 2022, defense expenditures in Eastern Europe increased to USD 76.3 billion. In 2022, 19 European NATO member nations, up from five in 2014 and 13 in 2020, dedicated a minimum of 20% of their defense spending to arms purchases and military R&D.
- In 2022, these member states' average proportion of defense spending on weapons and R&D increased to 24% from 22% in 2020 and 14% in 2014. Only two of the 26 NATO members in Europe with a military budget, Albania and Estonia, did not increase the portion of their budgets devoted to arms purchases and R&D from 2014 to 2021. By the end of March 2022, numerous European NATO member nations announced plans to increase military expenditure in response to the Russian invasion of Ukraine in February 2022, aiming to meet or exceed the NATO spending target of 2% of the GDP or higher. Belgium, Denmark, Germany, Lithuania, the Netherlands, Norway, Poland, and Romania were members of this group. These budgets were expected to be centered on the purchase of new armaments.

Fixed-wing aircraft accounted for 54% of the total fleet in the European military aviation market

- As of 2022, there were 8,326 active aircraft in Europe, of which fixed-wing aircraft accounted for 58% and rotorcraft for 42%. The total active aircraft fleet increased by 4% compared to 2016 in the region. Russia, the United Kingdom, the Netherlands, Germany, Italy, Spain, and France accounted for 95% of the total active fleet in the region.
- The fixed-wing aircraft and multi-role aircraft segments accounted for 54%, while transport aircraft, training aircraft, and others accounted for 16%, 23%, and 7%, respectively. In 2021, the active fleet of fixed-wing aircraft decreased by 3% compared to 2016. In rotorcraft, multi-mission helicopters accounted for 38%, while transport helicopters and other helicopters accounted for 30% and 32%, respectively. In 2021, the active fleet of rotorcraft increased by 1% compared to 2016.
- As of 2022, the average age of the Russian aircraft fleet was 10.5 years. The Yakovlev Yak-42 jets had the highest average age of any type of aircraft, at nearly 28 years. During the forecast period, the United Kingdom, Germany, France, Italy, and Spain may continue to build and buy next-generation aircraft to meet the demands of modern warfare. The regional armed forces are also upgrading the capabilities of helicopters with cutting-edge technology to achieve military superiority over possible invaders. The UK Ministry of Defence plans to retire several aging aircraft; however, it needs to actively continue the procurement of replacement aircraft to avoid any gaps within the fleet. The country's continued support for Ukraine in its war with Russia may add pressure on its defense budget. This factor may threaten the country's usual place as Europe's largest defense spender.

Europe Military Aviation Industry Overview

The Europe Military Aviation Market is fairly consolidated, with the top five companies occupying 72.44%. The major players in this market are Airbus SE, Dassault Aviation, Lockheed Martin Corporation, The Boeing Company and United Aircraft Corporation (sorted alphabetically).

Additional Benefits:

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

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