

Germany Aerospace And Defense - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts (2025 - 2030)

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Report description:

The Germany Aerospace And Defense Market size is estimated at USD 19.99 billion in 2025, and is expected to reach USD 28.45 billion by 2030, at a CAGR of 7.31% during the forecast period (2025-2030).

The German defense industry is poised for robust growth in the coming years. Bolstered by a surge in defense spending and heightened acquisitions of armaments, the German government is actively fortifying its defense capabilities, setting the stage for market expansion.

After the Russian invasion of Ukraine, Germany intensified its focus on military development. Domestic defense firms have significantly ramped up investments, channeling resources into cutting-edge armaments to bolster the nation's defense, which is expected to fuel the market's growth.

However, the German military faces mounting restrictions, as there are concerns about long-term market growth. The defense sector is poised for a significant opportunity with an influx of weapon orders and a parallel surge in hiring trained personnel to manage and maintain sophisticated equipment.

Germany Aerospace and Defense Market Trends

The Maintenance, Repair, and Overhaul Segment is Expected to Showcase Remarkable Growth During the Forecast Period

The German defense industry is poised for significant growth, particularly in its maintenance, repair, and overhaul (MRO) segment. This growth is primarily attributed to the German government's heightened focus on bolstering its air force capabilities,

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aligning them with global standards. This emphasis is underscored by a notable uptick in fighter aircraft acquisitions.

In December 2023, Germany had an active fleet of 621 aircraft and helicopters. This fleet included 209 combat aircraft, 46 transport aircraft, 287 combat helicopters, 39 training aircraft and helicopters, 37 special mission aircraft, and three tanker aircraft. Maintaining this diverse fleet is crucial for operational readiness and necessitates substantial MRO services. Furthermore, a key driver for the military aviation MRO market's growth in Germany is the nation's escalating military expenditure. In 2023, German defense spending reached USD 55.4 billion and marked a 0.6% increase from 2022, showcasing a consistent trend of budgetary increments.

Increasing border disputes in recent years have further underscored the need for Germany to fortify its fighter aircraft capabilities. This has translated into increased aircraft acquisitions, subsequently driving the demand for periodic maintenance services. For instance, in December 2023, Airbus Helicopters secured a USD 2.3 billion contract from Germany, entailing the delivery of 82 H145M twin-engine helicopters. This deal, with 62 firm orders and 20 options, also includes a seven-year support service commitment, with deliveries slated to commence in 2024.

In December 2022, the German Ministry of Defense signed a USD 8.8 billion agreement with Lockheed Martin for 35 F-35 Lightning II aircraft to replace the aging Tornado fighter-bomber aircraft in the German Air Force's fleet, with deliveries scheduled to start in 2026. These strategic procurements, alongside Germany's deepening collaborations with other nations in developing advanced military aircraft, are set to create a surge in opportunities for the nation's defense aircraft MRO capabilities, fueling the market's growth in the coming years.

The Army Segment is Expected to Dominate the Market During the Forecast Period

The army segment maintained its market dominance during the forecast period, buoyed by a surge in the country's military expenditure. The German government's heightened focus on defense armament procurement to bolster military capabilities is set to fuel the market's growth.

In response to the Russia-Ukraine conflict, Germany earmarked a special fund of USD 107 billion for its military, pushing defense spending beyond 2% of GDP. This surge in defense spending has translated into tangible procurement actions. For instance, in July 2023, Rheinmetall AG secured a USD 309 million contract to supply 367 military trucks to the German armed forces alongside 1,830 interchangeable swap-body platforms for vehicle customization. Deliveries were slated for the third quarter of 2023.

Similarly, in March 2023, Germany signed a deal with Australia for new combat reconnaissance vehicles based on the Boxer family, featuring a 30-millimeter gun. Deliveries are scheduled to commence in 2025. The German government is also intensifying its focus on modernizing existing armored vehicles. In April 2023, Rheinmetall AG and Krauss-Maffei Wegmann (KMW) were tasked with upgrading 143 Puma infantry fighting vehicles, with a commitment to enhance firepower and command and control capabilities by 2029.

With a target to reach USD 65 billion in military expenditure by 2024, the defense ministry has been actively engaging in various procurement activities. In June 2022, Teledyne FLIR Defense, a division of Teledyne Technologies, announced the completion of deliveries for 127 PackBot 525 UGVs to the German Army. These UGVs, known for their combat prowess from the caves of Afghanistan to the roads of Iraq, are a significant addition to the German Armed Forces' arsenal.

In December 2022, the German Ministry of Defense, in collaboration with Milrem Robotics and Krauss-Maffei Wegmann (KMW), signed a deal to supply 14 THeMIS UGVs to Ukraine. The growing emphasis on advanced UGV procurement and defense enhancement initiatives by the German Army is poised to propel the market's growth in the coming years.

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The German defense industry is fragmented, with various players dominating the market. Some of the major players are Rheinmetall AG, Lockheed Martin Corporation, Airbus SE, Leonardo SpA, and RTX Corporation.

Various market players are establishing joint ventures with the German government to develop advanced defense armaments to increase the country's long-term defense capability. Such ventures are helping regional players to increase their presence in the market. Moreover, increasing investments by several international defense companies in the German market are expected to increase the number of opportunities within the industry.

Additional Benefits:

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

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