

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

Market Report | 2025-04-28 | 392 pages | Mordor Intelligence

AVAILABLE LICENSES:

- Single User License \$4750.00
- Team License (1-7 Users) \$5250.00
- Site License \$6500.00
- Corporate License \$8750.00

Report description:

The Military Aviation Market size is estimated at 60.17 billion USD in 2025, and is expected to reach 75.52 billion USD by 2030, growing at a CAGR of 4.65% during the forecast period (2025-2030).

The market for military aviation is expected to expand as the military replaces older aircraft with fighter, large transport, and special mission aircraft

- The global military aircraft fleet has witnessed some drastic changes with large-scale and rapid upgradation in the military aircraft fleet globally. The fixed-wing aircraft segment accounted for around 57% of global military aircraft deliveries in 2022. The fixed-wing aircraft segment is expected to witness higher growth due to the increasing procurement of next-generation combat aircraft by several countries, such as the United States, Germany, India, Australia, the United Arab Emirates, and China. 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 helicopter segment, multi-mission helicopters are anticipated to register the highest growth during the forecast period. Most countries are planning to procure multi-mission helicopters to enhance their combat capabilities. The increasing military spending, fueled by the growth of political and geographical tensions between the countries, has increased procurement in countries such as India, Kuwait, Qatar, Australia, Russia, and the United Arab Emirates to strengthen their combat capabilities.
- Focus on indigenous manufacturing by various countries is also likely to boost the procurement of various advanced aircraft and rotorcraft by the armed forces worldwide during the forecast period. Under Vision 2030, the Government of Saudi Arabia is planning to increase the local military equipment spending to 50% by 2030 to strengthen its domestic manufacturing. During 2023-2030, over 7,700 military aircraft are expected to be delivered, further driving the market.

Scotts International. EU Vat number: PL 6772247784

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

The rising military conflicts globally have realigned the emphasis of the major military powers

- In 2022, the war between Russia and Ukraine further fueled the defense budgets across various countries and the need to reassess the operational readiness of the armed forces globally. The world military expenditure rose by 3.7% in 2022 to reach a record high of USD 2240 billion. Russia's invasion of Ukraine was a major driver of the growth in spending in 2022. The five biggest spenders in 2022 were the United States, China, Russia, India, and Saudi Arabia, which together accounted for 63% of world military spending.
- In 2022, the war between Russia and Ukraine further fueled the need to reassess the operational readiness of the global armed forces. NATO nations are undergoing fleet modernization and expansion programs with the procurement of new fixed-wing aircraft.
- The active fleet of fixed-wing aircraft increased by around 1% from 2017 to 2022. In terms of military helicopter procurements during 2017-2022, North America dominated the market with 37% of the total helicopter fleet. This is primarily driven by the United States, which has the largest military helicopter fleet globally, with 32% of the global share. Asia-Pacific is another significant market, with a share of 26%, due to the increasing defense budgets of countries like China and India. Europe has been witnessing a substantial growth of 20%, with countries like Russia, France, Germany, and the UK investing in helicopter modernization programs.
- The armed conflicts and internal security are aiding in the growth of defense expenditure globally, with nations strengthening their armed forces with new procurements of aircraft. With the expansion of aircraft fleets, the global military aviation market is expected to grow during 2023-2030.

Global 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

Scotts International. EU Vat number: PL 6772247784

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

- 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.

Military Aviation Industry Overview

The Military Aviation Market is fairly consolidated, with the top five companies occupying 72.20%. The major players in this market are Airbus SE, Dassault Aviation, Lockheed Martin Corporation, Textron Inc. and The Boeing Company (sorted alphabetically).

Additional Benefits:

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

Table of Contents:

1 EXECUTIVE SUMMARY & KEY FINDINGS

2 REPORT OFFERS

3 INTRODUCTION

3.1 Study Assumptions & Market Definition

3.2 Scope of the Study?

3.3 Research Methodology

4 KEY INDUSTRY TRENDS

4.1 Gross Domestic Product

4.1.1 Asia-Pacific

4.1.2 Europe

4.1.3 Middle East and Africa

4.1.4 North America

4.1.5 South America

Scotts International. EU Vat number: PL 6772247784

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

- 4.2 Active Fleet Data
 - 4.2.1 Asia-Pacific
 - 4.2.2 Europe
 - 4.2.3 Middle East and Africa
 - 4.2.4 North America
 - 4.2.5 South America
- 4.3 Defense Spending
 - 4.3.1 Asia-Pacific
 - 4.3.2 Europe
 - 4.3.3 Middle East and Africa
 - 4.3.4 North America
 - 4.3.5 South America
- 4.4 Regulatory Framework
- 4.5 Value Chain Analysis

5 MARKET SEGMENTATION (includes market size in Value in USD and Volume, Forecasts up to 2030 and analysis of growth prospects)

- 5.1 Sub Aircraft Type
 - 5.1.1 Fixed-Wing Aircraft
 - 5.1.1.1 Multi-Role Aircraft
 - 5.1.1.2 Training Aircraft
 - 5.1.1.3 Transport Aircraft
 - 5.1.1.4 Others
 - 5.1.2 Rotorcraft
 - 5.1.2.1 Multi-Mission Helicopter
 - 5.1.2.2 Transport Helicopter
 - 5.1.2.3 Others
- 5.2 Region
 - 5.2.1 Asia-Pacific
 - 5.2.1.1 Australia
 - 5.2.1.2 China
 - 5.2.1.3 India
 - 5.2.1.4 Indonesia
 - 5.2.1.5 Japan
 - 5.2.1.6 Malaysia
 - 5.2.1.7 Philippines
 - 5.2.1.8 Singapore
 - 5.2.1.9 South Korea
 - 5.2.1.10 Thailand
 - 5.2.1.11 Rest of Asia-Pacific
 - 5.2.2 Europe
 - 5.2.2.1 France
 - 5.2.2.2 Germany
 - 5.2.2.3 Italy
 - 5.2.2.4 Netherlands
 - 5.2.2.5 Russia
 - 5.2.2.6 Spain

Scotts International. EU Vat number: PL 6772247784

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

- 5.2.2.7 Turkey
- 5.2.2.8 UK
- 5.2.2.9 Rest of Europe
- 5.2.3 Middle East and Africa
 - 5.2.3.1 Algeria
 - 5.2.3.2 Egypt
 - 5.2.3.3 Qatar
 - 5.2.3.4 Saudi Arabia
 - 5.2.3.5 United Arab Emirates
 - 5.2.3.6 Rest of Middle East and Africa
- 5.2.4 North America
 - 5.2.4.1 Canada
 - 5.2.4.2 Mexico
 - 5.2.4.3 United States
 - 5.2.4.4 Rest of North America
- 5.2.5 South America
 - 5.2.5.1 Brazil
 - 5.2.5.2 Chile
 - 5.2.5.3 Colombia
 - 5.2.5.4 Rest of South America

6 COMPETITIVE LANDSCAPE

- 6.1 Key Strategic Moves
- 6.2 Market Share Analysis
- 6.3 Company Landscape
- 6.4 Company Profiles
 - 6.4.1 Airbus SE
 - 6.4.2 Dassault Aviation
 - 6.4.3 Leonardo S.p.A
 - 6.4.4 Lockheed Martin Corporation
 - 6.4.5 Northrop Grumman Corporation
 - 6.4.6 Pilatus Aircraft Ltd
 - 6.4.7 Russian Helicopters
 - 6.4.8 Textron Inc.
 - 6.4.9 The Boeing Company
 - 6.4.10 United Aircraft Corporation

7 KEY STRATEGIC QUESTIONS FOR AVIATION CEOS

8 APPENDIX

- 8.1 Global Overview
 - 8.1.1 Overview
 - 8.1.2 Porter's Five Forces Framework
 - 8.1.3 Global Value Chain Analysis
 - 8.1.4 Market Dynamics (DROs)
- 8.2 Sources & References
- 8.3 List of Tables & Figures

Scotts International. EU Vat number: PL 6772247784

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

- 8.4 Primary Insights
- 8.5 Data Pack
- 8.6 Glossary of Terms

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

Market Report | 2025-04-28 | 392 pages | Mordor Intelligence

To place an Order with Scotts International:

- Print this form
- Complete the relevant blank fields and sign
- Send as a scanned email to support@scott's-international.com

ORDER FORM:

Select license	License	Price
	Single User License	\$4750.00
	Team License (1-7 Users)	\$5250.00
	Site License	\$6500.00
	Corporate License	\$8750.00
		VAT
		Total

*Please circle the relevant license option. For any questions please contact support@scott's-international.com or 0048 603 394 346.

** VAT will be added at 23% for Polish based companies, individuals and EU based companies who are unable to provide a valid EU Vat Numbers.

Email*	<input type="text"/>	Phone*	<input type="text"/>
First Name*	<input type="text"/>	Last Name*	<input type="text"/>
Job title*	<input type="text"/>		
Company Name*	<input type="text"/>	EU Vat / Tax ID / NIP number*	<input type="text"/>
Address*	<input type="text"/>	City*	<input type="text"/>
Zip Code*	<input type="text"/>	Country*	<input type="text"/>
		Date	<input type="text" value="2026-02-27"/>
		Signature	

Scotts International. EU Vat number: PL 6772247784

tel. 0048 603 394 346 e-mail: support@scott's-international.com

www.scott's-international.com



Scotts International. EU Vat number: PL 6772247784

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com