

## **Military Fixed-wing Aircraft - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts (2025 - 2030)**

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### **Report description:**

The Military Fixed-wing Aircraft Market size is estimated at 51 billion USD in 2025, and is expected to reach 65.32 billion USD by 2030, growing at a CAGR of 5.07% during the forecast period (2025-2030).

Multi-role segment leads the market with a share of 64.8% in 2023

- The multi-role aircraft segment accounts for a major share in terms of revenue and volume as all the regions are investing heavily in the modernization of their aging military fixed-wing aircraft fleet and procuring next-generation aircraft.
- The training and transport aircraft segments may also show healthy growth between 2024 and 2030, as the countries are looking to procure newer generation aircraft to replace some of the old aircraft models that have been operational for over several decades. The others segment includes special mission platforms that serve as "force multipliers" and constitute a respectable segment in the military aviation market. Business jets or regional transport aircraft are being converted for special missions due to lower acquisition and operating costs.
- North America is expected to majorly drive the growth of this segment. Some of the major ongoing and future procurements of military fixed-wing aircraft include Germany's procurement of the F-35 from Lockheed Martin, which is likely to be delivered in 2026. The company also anticipates further orders for the aircraft in Europe, with Greece and the Czech Republic showing strong interest in the technologically advanced F-35.
- In December 2021, the United Arab Emirates made a deal with Dassault Aviation to purchase 80 Rafale F4 fighter jets for the UAE Air Force and Air Defence (UAE AF & AD). In May 2021, Egypt signed a contract with France to purchase 30 Rafale fighter jets in a deal valued at USD 4.5 billion.

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North America is expected to occupy majority of the share in the overall military fixed-wing aircraft market

- The fixed-wing aircraft accounted for around 60% of the global military aircraft fleet in 2022. The international security horizon in the second half of 2021 was marked by escalating conflicts and geopolitical and border issues, with major confrontations such as between Russia and Ukraine and India and China, and other nations in Asia-Pacific. The armed conflicts and internal security aided in a surge of defense expenditures globally, with nations strengthening their armed forces with new procurements of fixed-wing aircraft.
- The world defense expenditure crossed over USD 2.4 trillion in 2023, with major military powers such as the United States increased their defense budget. Because of which, the North America region is expected to be the largest across the world. The United States was followed by China, India, and Russia, which also increased their defense expenditure by 7.2%, 4.2%, and 24% respectively, when compared to 2022.
- In 2022, the war between Russia and Ukraine further fueled the need to reassess the operational readiness of the armed forces globally. NATO nations are undergoing fleet modernization and expansion programs with the procurement of new fixed-wing aircraft.
- The active fleet of fixed-wing aircraft surged by around 1.2% from 2017 to 2022. Asia-Pacific and the Middle East are the major regions with a growth of 7% and 5%, respectively, in their active fixed-wing aircraft fleet. With the expansion of aircraft fleet, the global fixed-wing aircraft market is expected to increase during the forecast period.

#### Global Military Fixed-wing Aircraft 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

- By the end of 2022, there were 15,543 active aircraft in the Asia-Pacific region, of which fixed-wing aircraft accounted for 60%

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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 Fixed-wing Aircraft Industry Overview

The Military Fixed-wing Aircraft Market is fairly consolidated, with the top five companies occupying 75.06%. The major players in this market are Airbus SE, Aviation Industry Corporation of China Ltd, Dassault Aviation, 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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