

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

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### **Report description:**

The Military Transport Aircraft Market size is estimated at 7.6 billion USD in 2025, and is expected to reach 8.15 billion USD by 2030, growing at a CAGR of 1.42% during the forecast period (2025-2030).

Rising demand for modern warfare associated with increasing defence budgets are the driving factors in the market

- Military transport aircraft accounted for 8% of the global military aircraft fleet in 2022. The international security horizon in the second half of 2021 was marked by escalating geopolitical and border conflicts, with major confrontations such as between Russia and Ukraine, India, China, and other nations in Asia-Pacific. The armed conflicts and internal security boosted defense expenditures globally, with countries strengthening their armed forces with new procurements of transport aircraft.
- The world's military expenditure rose 3.7% in 2022, reaching 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, accounting for 63% of world military spending.
- In 2022, the war between Russia and Ukraine fuelled the need to reassess the operational readiness of the armed forces globally. Groups such as NATO nations are undergoing fleet modernization and expansion programs with the procurement of new transport aircraft.
- The active fleet of military transport aircraft grew by around 0.4% from 2017 to 2022. North America and Asia-Pacific were accountable for 24% and 23% of the total transport aircraft active fleet globally.

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## Global Military Transport 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% 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 Transport Aircraft Industry Overview

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The Military Transport Aircraft Market is fairly consolidated, with the top five companies occupying 98.49%. The major players in this market are Airbus SE, Kawasaki Heavy Industries, Ltd., 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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