SCOTTS INTERNATIONAL

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

Market Report | 2025-04-28 | 162 pages | Mordor Intelligence

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Report description:

The North America Commercial Aviation Market size is estimated at 48.83 billion USD in 2025, and is expected to reach 60.48 billion USD by 2030, growing at a CAGR of 4.37% during the forecast period (2025-2030).

Fleet development of the airlines, and increasing demand for fuel-efficient aircraft is driving the demand for the commercial aircraft in North America

- The commercial aircraft market in North America is expected to experience significant growth during the forecast period, primarily driven by the demand for passenger aircraft due to the growing number of domestic passengers traveling.
- Fleet development of the airlines, increase in demand for fuel-efficient aircraft, growth in the number of airline passengers, and the airline industry's consideration of the zero-emission 2050 goal fuel the demand for commercial aircraft. As of August 2023, the region has a backlog of 1,474 Boeing aircraft and 986 Airbus aircraft. Of these total aircraft, the US alone has 2,405 aircraft in backlog. Hence, the country is expected to witness larger growth.
- Additionally, in North America, the United States has the largest fleet of commercial aircraft and is home to some of the biggest carriers in the world. In terms of new aircraft deliveries, in the region during 2017-2022, a total of 2,065 new commercial aircraft were procured by various airlines. Of these 2,065 aircraft, passenger aircraft accounted for 1,919, and freighter aircraft accounted for 146 aircraft. With the demand for air travel recovering, the airlines are restructuring their procurement plans and trying to maintain a relatively younger fleet to reduce operational costs, thus generating demand for new passenger aircraft.
- Furthermore, disruption in air cargo capacity proved to be positive for the freighter segment, as dedicated freighter fleets experienced volume and revenue increases, supported by accelerated e-commerce adoption. FedEx, UPS, and Atlas Air have plans to expand their fleet with new freighter aircraft during the forecast period.

Narrowbody aircraft is driving the region's commercial aviation activity

- The commercial aviation industry in North America has long been a significant player in the global aviation market. The demand for commercial aviation activity in the region is driven by the rising number of passengers traveling by air annually. In 2022, the region's air passenger traffic stood at 6 billion. The US accounted for the largest share, which was 83%, followed by Canada, Mexico, and the Rest of North America at 8%, 6%, and 2%, respectively.
- The rise of low-cost carriers (LCCs) and ultra-low-cost carriers (ULCCs) has disrupted the traditional airline business model. These carriers offer competitive fares, enticing a larger customer base and expanding air travel accessibility to more people. In terms of deliveries during 2017-2022, a total of 2,049 aircraft were procured by various airlines in the region. Of these 2,049 aircraft, passenger aircraft accounted for 96% and freighter aircraft accounted for 4%.
- A temporary halt in delivery of the 787 Dreamliner, delay in the 777X program, and delay in production ramp-up of A350s due to certification problems, as well as weak demand for the widebody jet, are expected to hamper the growth of the widebody segment during the first half of the forecast period. On the contrary, production ramp-up plans for 737MAX, A220, A321neo, and A321XLR will support the growth of the narrowbody segment in the region over the next decade. Overall, with developments such as these, the demand for commercial aviation aircraft is expected to rise, and during 2023-2030, a total of 2,997 commercial aviation aircraft is scheduled to be procured.

North America Commercial Aviation Market Trends

The increase in demand from domestic travelers is driving the market

- North America has long been a hub for air travel. With a vast landmass and diverse destinations, millions of passengers choose to fly domestically and internationally. Factors such as a growing economy, increased affordability of air travel, and a rising middle class have all contributed to a significant uptick in air passenger traffic. The air passenger traffic in the US reached 1.04 billion in 2022, up by 7% compared to 2021 and 12% compared to 2019.
- For the full year 2022, January through December, US airlines carried 853 million passengers, up from 658 million in 2021 and 388 million in 2020. The total number of passengers carried by airlines in Canada reached 107 million in 2022, surpassing the levels in 2021 by 6%. In 2022, Mexico had 100 million air passenger traffic, representing a 7% growth compared to its 2021 traffic levels. North America has benefitted from fewer and shorter-lasting travel restrictions than many other countries and regions. This has boosted domestic travel in a large home market, as well as international travel. Net profits for the region are expected to rise from USD 9.9 billion in 2022 to USD 11.4 billion in 2023.
- Additionally, to cater to the demand driven by air passenger traffic, various airlines in the region are planning to procure new aircraft. For instance, around one-third of global aircraft deliveries for 2023 are anticipated to be received by various carriers in North America. Although the region's aircraft deliveries were already above 2019 levels last year, they are expected to grow by an additional 72 units this year. Overall, with consistent air travel, the region's air passenger traffic is expected to increase by 1.7 billion in 2030, compared to 1.2 billion recorded in 2022.

North America Commercial Aviation Industry Overview

The North America Commercial Aviation Market is fairly consolidated, with the top five companies occupying 87.70%. The major players in this market are Airbus SE, ATR, Embraer, 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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