

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

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Report description:

The US Aviation Market size is estimated at 86.72 billion USD in 2025, and is expected to reach 105 billion USD by 2030, growing at a CAGR of 3.90% during the forecast period (2025-2030).

The Commercial Aviation Segment Is Expected To Occupy The Largest Market Share In The Us Aviation Market

- The United States is home to one of the world's largest and most diverse aviation markets, encompassing commercial aviation, military aviation, and general aviation. Commercial aviation plays a pivotal role in the US economy, connecting millions of passengers and transporting vast amounts of cargo across the nation and around the globe. With a growing population and increasing disposable incomes, the demand for air travel in the US remains steady.
- E-commerce and globalization have driven substantial growth in air cargo demand. The US airlines carried 194 million more passengers in 2022 than in 2021, up by 30% Y-o-Y. The US military aviation industry is one of the most technologically advanced and well-funded in the world. To maintain superiority, the US military continuously invests in research and development of advanced fighter jets and cutting-edge technologies, such as stealth and autonomous systems.
- In 2022, the US accounted for 39% of global defense spending military spending, which increased by USD 877 billion in 2022, or 0.7%. General aviation covers a wide range of non-commercial flying activities, including private aviation, flight training, aerial surveys, and medical evacuation. It comprises a diverse fleet of aircraft, from small single-engine planes to business jets.
- The US aviation market continues to thrive, driven by steady demand in commercial aviation, ongoing modernization efforts in military aviation, and the diverse activities of general aviation. The market's growth is intertwined with technological innovations, environmental considerations, and evolving consumer preferences. As the world becomes increasingly interconnected, the US aviation market is likely to remain a critical pillar of the nation's economy and security

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US Aviation Market Trends

Ease of restrictions and rising passenger travel are driving air passenger traffic

- US airlines carried 194 million more passengers in 2022 than in 2021, up by 30% Y-o-Y. 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. As a result, US carriers recovered 92% of their pre-pandemic levels in total, 88.9% of international traffic, and 92.45% of domestic traffic.
- In terms of the planned capacity levels for the summer 2023 season based on schedules, the number of seats US airlines planned to operate was about 6% higher than during the summer of 2019. About 715.6 million seats were scheduled to operate in the summer of 2023, compared with 673.9 million four years ago, before the pandemic. The big three network carriers saw changes as well, with American Airlines scheduling 1.2% more seats compared to 2019, while Delta Air Lines was down by 0.2%, and United Airlines was up by 3.3%. Southwest Airlines intended to operate 142.5 million seats, up by 16.4% in 2019, and the capacity offered by Spirit Airlines was to be some 42.8% higher with 35.4 million seats.
- The drop in travel demand and the associated losses faced by major airlines have resulted in airlines deferring their expected deliveries, mostly of widebody aircraft, and restructuring their existing fleet through the early retirement of a few aircraft models. For instance, in 2020, Delta Air Lines retired 227 aircraft to reduce the impact of the COVID-19 pandemic on revenue. Such deferrals impacted the delivery schedules of aircraft OEMs and compelled them to reduce their production rates in 2020 and 2021.

The increase in defense spending can be attributed to the various geopolitical threats faced by the US

- In 2022, the US accounted for 39% of global defense spending military spending, which increased by USD 877 billion in 2022, or 0.7%. In 2022, the US released the Department of the Air Force budget, which outlined that for FY 2023, the budget request was approximately USD 194.0 billion, a USD 20.2 billion or 11.7% increase from the FY 2022 request. The US DoD proposed USD 276.0 billion in acquisition funds for FY2023 (Procurement and Research, Development, Test, and Evaluation (RDT&E)), which comprised USD 145.9 billion for Procurement and USD 130.1 billion for RDT&E. The financing requested in the budget is a balanced portfolio approach to implementing the National Defense Strategy recommendations.
- Of the USD 276 billion in the request, USD 56.5 billion (USD 16.8 billion for RDT&E and USD 39.6 billion for Procurement) will finance aircraft and related systems, including money for aircraft R&D, aircraft acquisition, initial spares, and aircraft support equipment. The single most expensive defense program, the fifth generation F-35 Joint Strike Fighter (JSF), has USD 11.0 billion in requests for 61 aircraft for the Navy (F-35C), Marine Corps (F-35B & C), and Air Force (F-35A). Funding for FY 2023 also included the purchase of 24 F-15EX, 79 logistics and support aircraft, 119 rotary wing aircraft, and 12 UAV/UAS.
- The US Army's budget request for FY 2022 was USD 173 billion, the Navy's was USD 212 billion, and the Air Force's request was USD 213 billion. The aircraft and related systems category includes the following subgroups: Combat Aircraft (USD 23.0 billion), Cargo Aircraft (USD 5.0 billion), Support Aircraft (USD 1.6 billion), with the remaining budget for UAS, aircraft support, technology development, and aircraft modifications.

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US Aviation Industry Overview

The US Aviation Market is fairly consolidated, with the top five companies occupying 86.35%. The major players in this market are Airbus SE, Embraer, 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

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