SCOTTS INTERNATIONAL

Aerospace Industry In Mexico - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts (2025 - 2030)

Market Report | 2025-06-01 | 110 pages | Mordor Intelligence

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Report description:

Aerospace Industry In Mexico Market Analysis

The Mexican aerospace industry market size is estimated at USD 8.30 billion in 2025. It is projected to reach USD 11.34 billion by 2030, reflecting a 6.44% CAGR that positions the country among the fastest-expanding aerospace hubs worldwide. Growth stems from sustained nearshoring inflows under USMCA, ongoing recovery of FAA Category-1 status, and large-scale infrastructure projects such as the Mayan Train freight phase that compress logistics costs for manufacturers. A broad shift toward higher-value activities-engine assembly, avionics, AI-assisted design-signals Mexico's transition from a cost-focused base to an integrated aerospace ecosystem capable of full product-lifecycle support. Demand for fixed-wing commercial platforms and a growing maintenance backlog from an aging North American fleet catalyze production and MRO revenues. Competitive dynamics remain moderate as global incumbents expand capacity while local suppliers climb the value chain in composites and electrical systems integration.

Aerospace Industry In Mexico Market Trends and Insights

Near-shoring acceleration from USMCA and supply-chain remapping

OEMs continue to relocate precision machining, wiring harness, and avionics programs from Asia to Mexico as tightened rules-of-origin raise North American content thresholds. Investors favour Baja California and Queretaro clusters where suppliers deliver US-equivalent quality within shorter lead times, ensuring resilience amid global shocks. Cost savings on landed logistics, lower tariff exposure, and synchronized time zones now outweigh pure labour arbitrage considerations, making Mexico the default alternative for single-aisle aircraft assemblies. Tier-2 suppliers report order books extending through 2028 as OEMs secure buffer capacity near final-assembly sites in Seattle, Charleston, and Mobile.

Rapidly expanding skilled aerospace workforce and specialized clusters

A sector workforce of 60,000 underpins reliable program execution, with Queretaro alone projected to exceed 12,000 aerospace jobs in 2024. Collaborative curricula between the Aeronautical University of Queretaro and ten partner institutions ensure a steady inflow of engineers versed in composites, avionics, and design tools. Chihuahua's 45 certified firms now provide one-third of national employment, while Sonora leverages machining know-how from the mining industry. These hubs shorten onboarding cycles for new programs, mitigating the global engineer shortage that constrains production in rival locations.

Global material and engine-parts shortages delaying production

Airbus backlog surpassing 8,000 units, semiconductor constraints, and engine supply gaps translate into cascading line-stoppages at Mexican tier-1s, slowing the realisation of nearshoring benefits. GAO research confirms persistent sourcing difficulty for chips and critical alloys, prolonging inventory-holding cycles and squeezing cash flows. Some avionics firms redesign boards around available components, adding R&D cost and certification delay.

Other drivers and restraints analyzed in the detailed report include:

Government BASA and FAA Category-1 recovery boosting certification pipeline / Ageing North-American fleet raising local MRO demand / Energy-price volatility eroding cost-competitiveness /

For complete list of drivers and restraints, kindly check the Table Of Contents.

Segment Analysis

The manufacturing segment contributed a 70.89% share on the strength of engine assembly, aerostructures, and avionics output from the Safran group. Foreign direct investments such as Safran's USD 80 million LEAP line and GKN's USD 30 million composite expansion create capacity for high-value programs, underlining the country's progression from build-to-print to build-to-spec projects. Engineering and design offshoring to GE Aerospace's Queretaro centre exemplifies service portfolio broadening beyond metal-cutting, feeding demand for AI-optimised component redesigns.

The MRO segment, though smaller, is set to record an 8.35% CAGR through 2030 by addressing a regional engine-maintenance backlog overflow from US centres. Potential state purchase of Mexicana MRO Services could consolidate hangar capacity near the capital, improving slot availability for foreign carriers. As suppliers ascend the complexity curve, the Mexican aerospace industry widens its economic footprint into tooling, certification services, and advanced process development.

Fixed-wing platforms captured 85.60% of the Mexican aerospace industry market in 2024, anchored by single-aisle assemblies for global OEM supply chains and business-jet work packages in Baja California. Elevated passenger demand supports continued narrow-body output while Gulfstream expansions target high-net-worth buyers. Military fixed-wing CAGR of 7.21% reflects Air Force plans to modernise tactical airlift, with Airbus marketing the A400M as a C-130 replacement. Rotary-wing share remains limited but strategically vital for offshore energy and emergency services. Modernisation of light-attack and surveillance helicopters could open localisation avenues for fuselage and dynamic-component machining. With civil fleet renewal still lagging, the Mexican aerospace industry market size for rotary-wing MRO will likely expand in tandem with the oilfield rebound.

The Aerospace Industry in Mexico Market Report is Segmented by Industry (Manufacturing, Engineering and Design, and Maintenance, Repair, and Overhaul), Platform Type (Fixed-Wing, Rotary Wing, and Space), Component (Aerostructures and Fuselage, Engine Components, Avionics and Electronics, Interiors, and More), and End User (Commercial and Military). The Market Forecasts are Provided in Terms of Value (USD).

List of Companies Covered in this Report:

Safran SA / Airbus SE / Honeywell International Inc. / Bombardier Inc. / The Boeing Company / DAHER / RTX Corporation / General Electric Company / GKN Aerospace (Melrose Industries plc) / Eaton Corporation plc / Mexicana MRO Service / Embraer S.A / Gulfstream Aerospace Corporation / Aerovias de Mexico, S.A. de C.V. / MRO Holdings Inc. / Kinetic Engine Systems / Aeronaves Pegasus S.A. de C.V. /

Additional Benefits:

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

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