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UAM Infrastructure Market - A Global and Regional Analysis: Focus on Operation, Configuration, End User, Ecosystem, and Country - Analysis and Forecast, 2023-2033

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Abstracts

Introduction to UAM Infrastructure Market

The urban air mobility (UAM) infrastructure market has emerged as a crucial component in the development and implementation of futuristic transportation systems. UAM refers to the integration of air transportation into urban environments, enabling on-demand, safe, and efficient aerial mobility for passengers and cargo. This emerging industry aims to alleviate traffic congestion, reduce greenhouse gas emissions, and enhance overall transportation efficiency. The UAM infrastructure market encompasses a wide range of physical and digital assets required to support the operation of urban air vehicles. These assets include vertiports, charging and refueling stations, air traffic management systems, and communication networks. Vertiports serve as the primary hubs for UAM operations, providing takeoff and landing facilities, passenger boarding and disembarking areas, and maintenance and service infrastructure for electric aircraft.

Charging and refueling stations play a vital role in sustaining UAM operations by providing electric power or fuel for the aircraft. As the majority of UAM vehicles are expected to be electric, the development of a robust charging infrastructure is critical to enable efficient and rapid turnaround times for urban air vehicles. Additionally, advanced air traffic management systems and communication networks are essential to ensure the safe and efficient integration of UAM into existing airspace.

As the UAM industry continues to evolve, the infrastructure market is expected to witness substantial growth. It is anticipated that the demand for vertiports, charging

stations, and air traffic management systems will increase as more cities embrace UAM as a viable transportation solution. The development of standardized infrastructure solutions, interoperability frameworks, and seamless integration with existing transportation systems will be key factors in shaping the future of the UAM infrastructure market.

Market Introduction

The vertical mobility ecosystem relies on five factors for commercial materialization, which include hardware, infrastructure, operations, regulations, and social acceptance. These five factors influence the vertical mobility business models and shape the systems for adoption in urban demographics. Among these factors, most developments have happened in the hardware segment, with over 100 companies invested in the hardware development phase or in the concept validation phase. In order for the sector to commence operations by 2025, the factors of infrastructure, operations, and regulations should be developed substantially. The growth of urban air mobility (UAM) systems is driving an increasing demand for dedicated UAM infrastructure, and the market has witnessed significant growth in recent years, driven by the increasing development of advanced air mobility systems and the need for efficient transportation solutions in congested urban areas. UAM infrastructure, such as vertiports, charging stations, and air traffic management systems, is being developed to support the safe and efficient operation of UAM vehicles. This infrastructure is designed to cater to the unique requirements of UAM, enabling vertical takeoff and landing, electric propulsion, and integration with existing transportation networks.

Industrial Impact

The UAM infrastructure market is poised to have a profound impact on various industries, ushering in a new era of urban transportation. One of the primary benefits of a well-developed UAM infrastructure is the alleviation of traffic congestion in densely populated cities. By taking to the skies, UAM vehicles can bypass ground-level congestion, reducing travel times and improving overall efficiency. This enhanced mobility will not only benefit commuters but also have far-reaching implications for industries such as logistics and e-commerce, where quick and reliable transportation of goods is crucial.

In the upcoming years, UAM infrastructure market will register an exponential surge in demand from the scaling up of UAM services, with initial high demands for the airport shuttle services segment. Additionally, there will be a requirement for cargo hubs and specialized facilities, driven by the e-commerce and last mile delivery segment, which is expected to grow incrementally in the upcoming years, facilitated by advanced air mobility (AAM) delivery options, that will enhance the handling and logistics. For instance, in November 2022, Skyports and Groupe ADP launched the European vertiport terminal testbed in Paris, France. The testbed vertiport is aircraft agnostic and offers a chance for European eVTOL OEMs to validate the factors of their cargo and unmanned operations.

Market Segmentation:

Segmentation 1: by End User

- Airport Shuttle Service
- Healthcare
- Last Mile Delivery
- Tourism

Airport Shuttle Service End User to Lead the UAM Infrastructure Market

The UAM infrastructure market is led by the airport shuttle services segment, with a 45% share in 2023. Increasing UAM developments and commercialization of UAM operations for passenger and cargo transit in the coming years are driving the growth of the UAM infrastructure market.

As urban air mobility (UAM) continues to revolutionize how people move within cities, airport shuttle services are at the forefront of this transformative shift. These cutting-edge services utilize eVTOL aircraft to provide swift and efficient transportation to and from airports. The UAM airport shuttle services segment offers passengers a seamless travel experience. Instead of relying solely on conventional ground transportation, travelers have the option to board an eVTOL aircraft, which seamlessly navigates urban airspace to transport them to their desired airport destinations. These advanced aircraft combine the agility of helicopters with the efficiency and sustainability of electric propulsion, enabling quick and eco-friendly travel. Passengers can access UAM airport shuttle services through dedicated vertiports or helipads strategically located near or within the premises of major airports.

Segmentation 2: by Operation

- Passenger Gate-to-Gate
- Cargo Gate-to-Gate
- Hybrid Passenger and Cargo Gate-to-Gate
- Off-Nominal Operations

Passenger Gate-to-Gate to Dominate as the Leading Segment by Operation

The passenger gate-to-gate segment is expected to generate huge revenues for the application segment, followed by the cargo gate-to-gate.

The passenger gate-to-gate segment forms a major segment of the potential UAM market, with most major players working toward urban passenger transit as the primary end goal for the commercialization of their offerings. In this segment, various stakeholders collaborate to create a comprehensive ecosystem that ensures safe, efficient, and convenient passenger experiences. The infrastructure catering to this segment is strategically located in urban centers, airports, and other transportation hubs to optimize accessibility and connectivity. Additionally, they are equipped with state-of-the-art facilities such as boarding gates, passenger lounges, and baggage handling systems to enhance comfort and streamline operations. In conjunction with the physical infrastructure, advanced air traffic management systems play a critical role in enabling gate-to-gate operations.

Segmentation 3: by Configuration

- Private Operations
- Public Operations
- Single Fleet Operators
- Multiple Fleet Operators

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Piloted Operations

Autonomous Operations

Vertiplex

Public Operations to Dominate as the Leading Segment by Configuration

The UAM infrastructure market is led by the public operations in the configuration segment, with a 20% share in 2023, and is expected to grow to 30% by 2033, owing to the commercialization of UAM operations. Increasing UAM developments and commercialization of UAM operations for passenger and cargo transit in the coming years are driving the growth of the UAM infrastructure market.

The public operations segment of the vertiports in the UAM market represents a pivotal aspect of the evolving transportation landscape, focusing on the public-facing operations and services offered at these specialized facilities. Public vertiports should be designed to handle high volumes of passengers, ensuring efficient passenger flow, security screening, and ticketing services. Integration with existing public transportation networks and seamless intermodal connectivity is a key aspect of public vertiports. Public vertiports will be built once the segment commercializes the volume of operations, as the public vertiports are cost-intensive, and collaborative usage will reduce the net expenses incurred for the infrastructure. This will also potentially allow for cross-collaboration of services in the near future.

Segmentation 4: by Ecosystem

Physical Infrastructure

Digital Infrastructure

Physical Infrastructure to Witness the Highest Growth between 2023 and 2033

The UAM infrastructure market is dominated by the physical infrastructure segment in 2023, with a 92.53% share in terms of revenue due to the high demand for UAM ground segment physical infrastructure to accommodate and initiate the UAM operations.

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In terms of physical infrastructure, the UAM market is characterized by the need for vertiports, landing pads, and charging stations strategically distributed throughout urban landscapes. These structures must be carefully designed to accommodate UAM platforms, ensuring safe and efficient operations while optimizing available space. The UAM digital infrastructure offerings are constituted of four elements, namely, the control center (systems for remote surveillance), air traffic management (ATM), unmanned traffic management (UTM), and navigation aids and connecting networks.

Segmentation 5: by Country

- U.S.
- U.K.
- U.A.E.
- Saudi Arabia
- France
- Australia
- Italy
- Netherlands
- South Korea
- China
- Japan
- India
- Brazil
- Germany
- Singapore

The U.S. has the highest growing market in the countries, registering a CAGR of 21.43%. The U.S. market for UAM infrastructure is poised for significant growth and is expected to be one of the largest markets globally. With a favorable regulatory environment and significant investments in research and development, the market is expected to reach substantial revenue figures. The market size is driven by the country's large urban population, economic potential, and favorable business ecosystem. The country has most of the major global eVTOL developers, including Archer Aviation, Joby Aviation, Wisk Aero, Jaunt Air Mobility, and many others, who are rapidly advancing their prototype development toward certification and operational induction. Out of the over $5 billion invested globally in the development of the UAM ecosystem, the U.S. accounts for the largest investment base and development of the eVTOL platforms. All these factors potentially make the U.S. a multi-billion-dollar market for UAM services.

Recent Developments in the UAM Infrastructure Market

In May 2023, Ferrovial and Milligan announced a partnership to develop a network of vertiports in the U.K. Milligan would act as the real estate identification and assessment partner for the development of urban vertiports.

In April 2023, Skyway and Skyportz announced a strategic partnership to develop complacent infrastructure for the Australian UAM segment.

In March 2023, Kookiejar and Terminal Holdings, an Abu Dhabi-based ground handling service provider, signed a memorandum of understanding (MoU) for collectively building and operating vertiports for the growing UAM sector.

In March 2023, Ferrovial and Eve Air Mobility signed a letter of intent (LoI) to explore the integration of Eve’s urban air traffic management (UATM) software solutions in the vertiports developed by Ferrovial.

In January 2023, Skyway and Siemens announced a collaboration to factor in the electrical and digital infrastructure that would be essential to support vertiport operations.

Demand – Drivers and Limitations

Following are the drivers for the UAM infrastructure market:

Urban and Regional Aerial Cargo Transportation

Adoption of Urban Air Mobility in Megacities

Collaborative Partnership among UAM Infrastructure Developers and eVTOL Manufacturers

Following are the challenges for the UAM infrastructure market:

Constraints in Navigation and Communication Infrastructure Supporting UAM

Public Acceptance of UAM Services

Lack of Electrical Infrastructure for UAM Charging

Real Estate and Financing Challenges in Developing UAM Infrastructure

Following are the opportunities for the UAM infrastructure market:

Increasing Infrastructure Demand for UAM Operations

Repurposing Existing Aviation Infrastructure into Vertiport Hubs

How can this report add value to an organization?

Product/Innovation Strategy: The product segment helps the reader understand the different types of solutions available for deployment and their potential globally. Moreover, the study provides the reader with a detailed understanding of the UAM infrastructure market by operations, configurations, end user application (airport shuttle services, healthcare, last mile delivery, and tourism), and ecosystem (physical infrastructure and digital infrastructure).

Growth/Marketing Strategy: The UAM infrastructure market has seen some major development by key players operating in the market, such as business expansion, partnership, collaboration, and joint venture. The favored strategy for the companies has been partnerships and collaborations to strengthen their position in the UAM infrastructure market. For instance, in October 2022, Skyports, in collaboration with Joby Aviation, launched the Living Lab to test and demonstrate the technology and procedures to provision eVTOL travel. The terminal would play an important role in the development of a ‘zero-wait’ passenger experience in the UAM Service segment. In November 2022, Skyports and Groupe ADP collaboratively launched the European vertiport terminal testbed in Paris, France. The testbed vertiport is aircraft agnostic and offers a chance for European eVTOL OEMs to validate the factors of their operations.

Competitive Strategy: Key players in the UAM infrastructure market has been analyzed and profiled in the study, inclusive of major segmentations and service offerings companies provide in the physical infrastructure and digital infrastructure segments, respectively. Moreover, a detailed competitive benchmarking of the players operating in the UAM infrastructure market has been done to help the reader understand how players stack against each other, presenting a clear market landscape. Additionally, comprehensive competitive strategies such as partnerships, agreements, and collaborations will aid the reader in understanding the untapped revenue pockets in the market.

Methodology: The research methodology design adopted for this specific study includes a mix of data collected from primary and secondary data sources. Both primary resources (key players, market leaders, and in-house experts) and secondary research (a host of paid and unpaid databases), along with analytical tools, are employed to build the predictive and forecast models.

Data and validation have been taken into consideration from both primary sources as well as secondary sources.

Key Market Players and Competition Synopsis

The companies that are profiled have been selected based on thorough secondary research, which includes analyzing company coverage, product portfolio, market penetration, and insights that are gathered from primary experts.

In the UAM infrastructure segment, physical infrastructure facilitators lead the segment, with around 65% of the presence in the market. Players in the digital infrastructure facilitating spectrum account for approximately 35% of the presence in the market.

Key Companies Profiled:

- Altaport, Inc.
- ANRA Technologies
- BETA Technologies
- Bluenest
- Embention
- Ferrovial
- FEV Group
- Groupe ADP
- Kookiejar
- ResilienX
- Skyports Limited
- Skyscape Corporation
- Skyway
- Urban-Air Port Ltd
- UrbanV S.p.A
- Volatus Infrastructure, LLC

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