

Global Aircraft Manufacturing Market Size Study and Forecast by Aircraft Type (Helicopters, Passenger Aircraft, Commercial Aircraft, Military Aircraft, Others), By Application (Military & Defense, Civil, Freight, Others), and Regional Forecasts 2026–2036

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Abstracts

Global Aircraft Manufacturing Market Definition & Scope

The Global Aircraft Manufacturing Market, valued at USD 446.98 Billion in 2025, is projected to reach USD 657.01 Billion by 2036, expanding at a CAGR of 3.59% during the forecast period. Rising air passenger traffic and expanding airline fleets are among the most significant factors driving aircraft manufacturing demand. According to the International Air Transport Association (IATA), global passenger demand increased by 5.3% in 2025, while international passenger demand grew by 7.1%, with the global passenger load factor reaching a record 83.6%. The continued recovery and expansion of global aviation are increasing aircraft utilization rates and creating pressure on airlines to add capacity, replace aging aircraft, and modernize fleets with more fuel-efficient and technologically advanced platforms. The strong order pipeline across major aircraft manufacturers further demonstrates the scale of underlying demand, with Airbus ending 2025 with a record 8,754 aircraft backlog after recording 1,000 gross commercial aircraft orders during the year.

The market is also benefiting from increasing aircraft replacement requirements, defense fleet modernization, expanding air cargo transportation, and rising investments in next-generation aviation technologies. Airlines are increasingly replacing older aircraft with newer platforms that offer improved fuel efficiency, greater passenger capacity, lower operating costs, and reduced emissions, while defense organizations are investing in advanced combat, transport, surveillance, and specialized aircraft to

strengthen military capabilities. The continued expansion of e-commerce and international trade is also supporting demand for air freight aircraft and cargo capacity. At the manufacturing level, advancements in composite materials, advanced propulsion, avionics, additive manufacturing, automation, robotics, artificial intelligence, digital twins, and connected production systems are enabling manufacturers to improve production efficiency, reduce manufacturing time, enhance aircraft performance, and optimize quality control. In addition, increasing investments in aircraft production facilities, localized aerospace supply chains, sustainable aviation technologies, hydrogen and hybrid-electric propulsion research, and automated manufacturing systems are expected to strengthen aircraft production capabilities and support the long-term growth of the global aircraft manufacturing market through 2036.

Global Aircraft Manufacturing Market: Key Highlights

The Global Aircraft Manufacturing Market was valued at USD 446.98 Billion in 2025 and is projected to reach USD 563.11 Billion by the year 2030, at a CAGR of 4.9% during 2020-2030.

The market is expected to grow at a CAGR of 3.59% during 2026-2036 and reach USD 657.01 Billion by 2036. Commercial aircraft production, military fleet modernization, increasing aircraft deliveries and investments in advanced manufacturing technologies support growth.

The North American aircraft manufacturing market is expected to dominate the global aircraft manufacturing market owing to its well-established aerospace manufacturing capabilities, presence of major aircraft programs, extensive supplier networks, advanced production infrastructure, and high demand for commercial and military aircraft.

Asia Pacific is projected to witness the fastest growth during 2026–2036, owing to expanding passenger aviation, growing aircraft demand, growing aerospace manufacturing capabilities, defense modernization, and investments in indigenous aircraft production programs.

Passenger Aircraft is anticipated to be a major aircraft type segment driven by rising global air passenger traffic, fleet expansion, aircraft replacement needs and growing airline demand for new-generation aircraft.

For Commercial Aircraft, market demand is expected to be strong as airlines

increase fleet sizes to accommodate growing passenger volumes and replace aging aircraft with more fuel-efficient models.

Military Aircraft is expected to witness steady growth owing to defense modernization programs, replacement of aging fleets, rising defense spending and investments in advanced combat, transport, surveillance and specialized aircraft.

Helicopters will remain a key aircraft type, supported by applications in military and defense, emergency services, transportation, offshore and specialist civil aviation.

Military & Defense is projected to be a key segment of the market due to the increased procurement of advanced military aircraft, fleet modernization, defense aerospace investments, and indigenous aircraft development.

Demand for aircraft manufacturing is expected to be driven by civil applications, supported by growth in commercial aviation, expansion of passenger traffic, fleet renewal and the growing need for efficient next-generation aircraft.

The growth of global trade, e-commerce, express delivery and time-sensitive logistics is expected to boost the demand for cargo aircraft and dedicated air freight capacity, and hence freight applications are expected to gain traction.

Investment in composite materials, advanced propulsion, avionics, digital manufacturing, additive manufacturing, automation, robotics, artificial intelligence, connected aircraft systems, production facilities, supply-chain localization and sustainable aviation technologies will provide significant long-term opportunities for aircraft manufacturers, component suppliers, aerospace technology companies and aviation industry stakeholders thru 2036.

Research Scope & Methodology

The study offers a detailed strategic analysis of the global aircraft manufacturing market for the period 2026-2036. The report provides an analysis of the market size, revenue forecasts, competitive landscape, technological developments, aircraft manufacturing, fleet expansion and emerging investment opportunities affecting the global aircraft manufacturing industry. The assessment includes Aircraft Type (Helicopters, Passenger

Aircraft, Commercial Aircraft, Military Aircraft, Others) Application (Military & Defense, Civil, Freight, Others). The regional analysis is based on North America, Europe, Asia Pacific, and LAMEA. It analyzes air passenger traffic, aircraft deliveries, fleet replacement requirements, defense modernization, air freight demand, aerospace manufacturing capabilities, production capacity, and investments in indigenous aircraft programs that affect the growth of the regional market. The report also discusses the developments in composite materials, advanced propulsion, avionics, digital manufacturing, additive manufacturing, automation, robotics, artificial intelligence, connected aircraft systems, and sustainable aviation technologies that are transforming the competitive scenario of the global aircraft manufacturing market.

The research methodology combines the best of primary and secondary research to provide a clear understanding of the market. Primary research involved structured interviews with aircraft manufacturers, suppliers of aerospace components, manufacturers of engines, airlines, defense organizations, and aviation authorities, providers of manufacturing technologies, and experts from the industry across the major global markets. Secondary research sources include aviation authorities publications, government agencies, aerospace organizations, company annual reports and investor presentations, aircraft delivery reports, technical publications, defense procurement reports, and authenticated market intelligence sources. Market estimates are derived by combining the top down approach and bottom up approach that are validated thru data triangulation to provide accurate market estimation at the regional and global level. Forecast models include: • Aircraft production • Commercial fleet growth • Passenger traffic • Military procurement • Air freight demand • Aircraft replacement cycles • Manufacturing capacity • Aerospace technology adoption It offers a holistic view of the shifting competitive scenario in the Global Aircraft Manufacturing Market by analyzing the aircraft portfolios, production capacities, manufacturing facilities, technological expertise, geographic footprint, investment in research and development, strategic collaborations, and production expansion programs of key players in the market.

Key Market Segments

By Aircraft Type:

Helicopters

Passenger Aircraft

Commercial Aircraft

Military Aircraft

Others

By Application:

Military & Defense

Civil

Freight

Others

Key Market Players

Commercial Aircraft Corporation of China Ltd. (COMAC)

Dassault Aviation SA

Textron Inc.

Avions de Transport Régional GIE (ATR)

Hindustan Aeronautics Limited

Kawasaki Heavy Industries, Ltd.

Mitsubishi Heavy Industries, Ltd.

Korea Aerospace Industries, Ltd.

Leonardo S.p.A.

Pilatus Aircraft Ltd.

Industry Trends

With the employment of automation, robotics, digital twins, advanced production planning and connected manufacturing systems, digital manufacturing is increasingly changing aircraft production to improve production efficiency and quality.

Additive manufacturing is becoming more and more important in aircraft production, as manufacturers increasingly use 3D printing for selected components, tooling and production applications. The technology can help reduce weight, design flexibility and shorter production lead-times.

Composite materials are increasingly being used in aircraft manufacturing as manufacturers look to lightweight structures that can improve fuel efficiency, aircraft performance, durability and lifecycle economics.

Interest in advanced propulsion technologies is growing as aircraft manufacturers and engine developers strive to improve fuel efficiency, reduce emissions and support the development of next generation commercial and military aircraft.

Automation and robotics are growing in aircraft assembly and component manufacturing. Higher precision and repeatability in manufacturing are being supported by automation in drilling, fastening, inspection, material handling, and other production processes.

Artificial intelligence is increasingly being integrated in aircraft manufacturing for production planning, quality inspection, predictive maintenance of manufacturing equipment, supply-chain management and optimization of production processes.

Due to demand for aircraft delivery and backlogs of aircraft production, manufacturers and suppliers are boosting their production capacity. Investments in manufacturing facilities, workforce skills, tooling and supplier networks are becoming more and more important to meet aircraft demand.

Supply-chain localization and resilience are gaining importance as aircraft manufacturers seek to minimize production disruptions and improve availability of critical components, materials and specialized aerospace systems.

With aerospace companies looking for ways to cut energy use, material waste, emissions from production, and environmental impacts across the aircraft manufacturing chain, sustainable manufacturing is receiving more and more attention.

Innovation is still driven by strategic alliances among aircraft manufacturers, engine developers, aerospace component suppliers, manufacturing technology providers, defense organizations and research institutions. The global aircraft manufacturing market is expected to continue to grow thru 2036. Investments in composite materials, advanced propulsion, avionics, digital manufacturing, additive manufacturing, automation, robotics, artificial intelligence, connected manufacturing systems and sustainable production technologies are supporting the growth.

Market Determinants

Increasing Commercial Aircraft Production: Rising passenger traffic, airline fleet expansion, and aircraft replacement requirements are increasing demand for new aircraft. Growing order backlogs are encouraging manufacturers to expand production capacity, assembly facilities, and supplier networks.

Growing Defense Aircraft Procurement: Increasing defense expenditure and military modernization programs are supporting demand for combat aircraft, military transport platforms, helicopters, surveillance aircraft, and other specialized military aviation systems.

Advancements in Digital and Automated Manufacturing: Increasing adoption of robotics, automation, digital twins, artificial intelligence, and connected manufacturing systems is improving aircraft production efficiency, quality control, and manufacturing precision. These technologies are also supporting efforts to increase production rates.

Increasing Adoption of Lightweight Materials and Advanced Propulsion: Growing use of composite materials, advanced alloys, fuel-efficient engines, and next-generation propulsion technologies is enabling manufacturers to improve aircraft performance, reduce operating costs, and support aviation sustainability objectives.

High Aircraft Development and Manufacturing Costs: Aircraft manufacturing requires substantial investment in engineering, tooling, production facilities, testing, certification, specialized labor, and supply-chain management. High capital requirements can create barriers to entry and increase financial risks associated with new aircraft programs.

Supply Chain Disruptions and Skilled Labor Constraints: Aircraft production depends on complex global networks of specialized component, material, engine, avionics, and systems suppliers. Component shortages, logistics disruptions, and shortages of skilled aerospace workers can delay production schedules, increase costs, and constrain manufacturers' ability to meet delivery targets.

Opportunity Mapping Based on Market Trends

Expansion of Commercial Aircraft Production: Increasing passenger traffic, airline fleet expansion, aircraft replacement programs, and growing aircraft order backlogs are creating significant opportunities for aircraft manufacturers and aerospace suppliers. Investments in production facilities, assembly capacity, tooling, and supplier networks can support higher aircraft output.

Growth of Military Aircraft Manufacturing: Rising defense expenditure and military modernization programs are creating opportunities across combat aircraft, military transport platforms, helicopters, surveillance aircraft, and specialized aviation systems. Indigenous aircraft development initiatives are further expanding opportunities for domestic aerospace manufacturers.

Advancement of Digital and Automated Manufacturing: Increasing adoption of robotics, automation, digital twins, artificial intelligence, connected manufacturing systems, and automated inspection is creating opportunities to improve production efficiency, manufacturing precision, quality control, and production scalability.

Development of Lightweight and Sustainable Aircraft Technologies: Growing demand for fuel-efficient and lower-emission aircraft is creating opportunities for composite materials, advanced propulsion, lightweight structures, additive manufacturing, and sustainable production technologies. Companies investing in

composite materials, advanced propulsion, avionics, digital manufacturing, additive manufacturing, automation, robotics, artificial intelligence, connected manufacturing systems, and sustainable production technologies will be well positioned to capitalize on the continued growth of the global aircraft manufacturing market through 2036.

Value-Creating Segments and Growth Pockets

Passenger Aircraft Lead Amid Expanding Air Travel

Passenger Aircraft are expected to lead the aircraft type segment, accounting for an estimated 52.8% share in 2025. The segment's leadership is supported by increasing global air passenger traffic, airline fleet expansion requirements, aircraft replacement needs, and rising demand for new-generation aircraft. Airlines are increasingly expanding and modernizing their fleets to accommodate growing passenger volumes while improving fuel efficiency, operating economics, passenger capacity, and environmental performance. According to Airbus, 2025, global passenger traffic is projected to grow at approximately 3.6% annually over the long term, creating demand for around 43,400 new passenger and freighter aircraft over the next 20 years. The replacement of aging aircraft with fuel-efficient platforms, expanding air connectivity across emerging economies, and increasing aircraft utilization are further strengthening passenger aircraft manufacturing demand. Continued investments in next-generation aircraft programs and expanded production capabilities are expected to sustain the segment's leadership through 2036.

Commercial Aircraft are projected to register the highest CAGR of 4.6% during 2026–2036, driven by fleet growth, aging aircraft replacement, higher aircraft deliveries, and increasing demand for fuel-efficient platforms. Airlines are increasingly prioritizing aircraft equipped with advanced propulsion, lightweight materials, improved aerodynamics, and digital technologies to reduce operating costs and emissions. Growing passenger traffic and expanding domestic and international aviation networks are encouraging carriers to increase fleet capacity, while persistent aircraft backlogs and delayed fleet replacement are creating substantial manufacturing requirements. Increasing investments in next-generation narrowbody and widebody aircraft, production automation, advanced composites, and digital manufacturing are expected to improve manufacturing capacity and support strong commercial aircraft demand throughout the forecast period. Military Aircraft are expected to witness steady growth, supported by defense modernization programs, fleet replacement, and increasing

investments in advanced combat, transport, surveillance, reconnaissance, and specialized aircraft. Rising defense expenditure and indigenous aircraft manufacturing programs are expected to create additional opportunities for aircraft manufacturers.

Military Modernization Strengthens Aircraft Manufacturing Demand

Military & Defense is expected to remain a major application segment, accounting for an estimated 30.4% share in 2025. The segment is supported by increasing defense aerospace expenditure, modernization of military fleets, acquisition of advanced aircraft, and growing investments in indigenous aircraft manufacturing programs. Governments are increasingly strengthening air capabilities through procurement of advanced combat aircraft, strategic transport platforms, surveillance and reconnaissance systems, and specialized aviation platforms. Growing requirements for stealth capabilities, advanced avionics, electronic warfare, autonomous systems, and network-enabled operations are further increasing demand for sophisticated military aircraft. Indigenous manufacturing initiatives and efforts to localize aerospace supply chains are also encouraging investments in domestic production facilities and technology development. Long-term defense procurement programs provide sustained order visibility for manufacturers and are expected to support continued military aircraft production through 2036.

Civil applications are projected to register the highest CAGR of 4.1% during 2026–2036, driven by expanding commercial aviation, higher passenger traffic, fleet renewal, and rising demand for efficient next-generation aircraft. Airlines are increasingly replacing older aircraft with newer platforms offering improved fuel efficiency, greater passenger capacity, lower operating costs, and reduced emissions. Growing air connectivity across emerging economies, expansion of low-cost carrier networks, and increasing aircraft utilization are creating additional fleet requirements. According to Boeing's 2025 Commercial Market Outlook, the global commercial fleet is expected to nearly double over the next 20 years as airlines add capacity and replace older aircraft, reinforcing the long-term manufacturing opportunity. Investments in airport infrastructure, airline fleet modernization, advanced propulsion, lightweight materials, and digital aircraft technologies are expected to further support civil aircraft manufacturing demand.

Regional Market Assessment

Established Aerospace Manufacturing Base Sustains North American Leadership

North America is expected to dominate the global aircraft manufacturing market, accounting for an estimated 39.8% share in 2025. The region's leadership is supported

by established aerospace manufacturing capabilities, major aircraft production programs, extensive supplier networks, advanced production infrastructure, and strong commercial and military aircraft demand. The United States remains the primary contributor, supported by large-scale commercial aircraft production, military aircraft programs, engine manufacturing, advanced avionics development, and an extensive aerospace supply chain. Continued investments in aircraft production capacity, automated manufacturing, composite materials, digital production technologies, and next-generation aircraft development are strengthening regional manufacturing capabilities. Strong demand for fleet modernization, defense aircraft, advanced propulsion systems, and replacement aircraft is expected to sustain North American leadership through 2036.

Expanding Aviation and Indigenous Production Accelerate Asia Pacific Growth

Asia Pacific is projected to register the highest CAGR of 4.5% during 2026–2036, fueled by expanding passenger aviation, increasing aircraft procurement, growing aerospace manufacturing capabilities, defense modernization, and rising investments in indigenous aircraft production. China, India, Japan, South Korea, and other regional economies are strengthening domestic aerospace ecosystems through investments in aircraft assembly, component manufacturing, MRO infrastructure, advanced materials, and aviation technology development. Rapid passenger traffic growth and airline fleet expansion are creating additional demand for commercial aircraft, while increasing defense expenditure is supporting military aircraft procurement and domestic production programs. The region's growing role in global aerospace supply chains and increasing localization of aircraft manufacturing capabilities are expected to create significant opportunities for aircraft manufacturers and component suppliers.

Advanced Aerospace Capabilities Support European Market Growth

Europe represents a significant aircraft manufacturing market, supported by established aerospace industries, advanced aircraft production capabilities, strong commercial aviation demand, and extensive defense aerospace programs. Countries including France, Germany, the United Kingdom, Italy, and Spain continue to invest in aircraft development, manufacturing automation, advanced materials, propulsion technologies, and sustainable aviation systems. The region benefits from a sophisticated aerospace supply chain covering aircraft manufacturers, engine producers, component suppliers, avionics companies, and specialized engineering firms. Increasing demand for fuel-efficient aircraft, fleet modernization, defense aircraft, and next-generation aviation technologies is encouraging manufacturers to invest in advanced production systems

and sustainable manufacturing processes, supporting long-term regional market expansion.

Aviation Expansion and Aerospace Investments Create LAMEA Opportunities

LAMEA is emerging as a promising aircraft manufacturing market owing to increasing aviation activity, fleet expansion, defense modernization, and investments in aerospace manufacturing infrastructure. Countries across the Middle East, Latin America, and Africa are increasing aircraft procurement to support growing passenger traffic, expanding airline fleets, military modernization, and regional connectivity. Several countries are also seeking to strengthen domestic aerospace capabilities through investments in aircraft maintenance, component manufacturing, engineering services, and localized production. Growing airport infrastructure, rising aviation connectivity, and increasing defense requirements are creating opportunities for aircraft manufacturers and aerospace suppliers. Continued investments in indigenous capabilities, MRO infrastructure, and next-generation aviation technologies are expected to support regional market development through 2036.

Recent Developments

May 2025: COMAC continued expanding its commercial aircraft production and delivery capabilities to support growing demand for domestically manufactured passenger aircraft.

April 2025: Hindustan Aeronautics Limited continued strengthening its aircraft manufacturing and aerospace production capabilities to support India's military and civil aviation requirements.

October 2024: Leonardo S.p.A. continued advancing aircraft manufacturing, aerospace systems, and production capabilities across its commercial and defense aviation portfolio.

August 2024: Korea Aerospace Industries Ltd. continued expanding its aircraft development and manufacturing capabilities, supporting military and aerospace modernization programs.

Critical Business Questions Addressed

How will the Global Aircraft Manufacturing Market evolve through 2036?

The report evaluates long-term market development driven by passenger traffic, aircraft deliveries, fleet replacement, defense procurement, production capacity expansion, and advanced manufacturing technologies.

Which aircraft type and application segments will generate the greatest opportunities?

The study identifies leading and high-growth segments across helicopters, passenger aircraft, commercial aircraft, military aircraft, civil aviation, military and defense, and freight applications.

What are the primary factors driving market expansion?

The report analyzes the influence of passenger aviation growth, aircraft replacement requirements, defense modernization, digital manufacturing, automation, advanced materials, propulsion technologies, and aerospace production investments.

Which regional markets present the strongest long-term investment potential?

The assessment compares aircraft demand, aerospace manufacturing capabilities, production capacity, defense expenditure, indigenous aircraft programs, and investments in advanced manufacturing technologies across major regions.

How can aircraft manufacturers strengthen their competitive position?

The report examines strategic priorities including composite materials, advanced propulsion, avionics, digital manufacturing, additive manufacturing, automation, robotics, artificial intelligence, connected manufacturing systems, supply-chain localization, and sustainable production technologies.

Beyond the Forecast

The aircraft manufacturing market will continue to evolve through advancements in composite materials, advanced propulsion, avionics, digital manufacturing, additive manufacturing, automation, robotics, artificial intelligence, connected manufacturing systems, and sustainable production technologies.

Rising investments in commercial aircraft production, military aircraft procurement, aircraft replacement, manufacturing capacity, indigenous aerospace programs, and supply-chain localization will continue creating opportunities for aircraft manufacturers, component suppliers, and aerospace technology providers.

As aviation and defense organizations increasingly prioritize fleet expansion, aircraft efficiency, production scalability, supply-chain resilience, modernization, and sustainable manufacturing, companies investing in next-generation aircraft production technologies will be well positioned to capitalize on long-term opportunities in the global aircraft manufacturing market through 2036.

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