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Global Electric Aircraft Market Size Study and Forecast by Technology (Battery-powered, Hybrid-electric, Hydrogen-powered), By Type (Light & Ultralight Aircraft, Business Jets, Regional Transport Aircraft), By Range (Less than 200 km, 201–500 km, More Than 500 km), By Application (Commercial, Military), and Regional Forecasts 2026–2036

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Abstracts

Global Electric Aircraft Market Definition & Scope

The Global Electric Aircraft Market, valued at USD 10.61 Billion in 2025, is projected to reach USD 18.96 Billion by 2036, expanding at a CAGR of 5.4% during the forecast period. The market is being driven primarily by the aviation industry's increasing focus on reducing carbon emissions and transitioning toward lower-emission propulsion technologies. Electric propulsion offers the potential to reduce or eliminate direct combustion emissions during flight while improving propulsion efficiency, particularly for short-range aircraft and emerging regional mobility applications. This transition is becoming increasingly important as aviation seeks pathways toward its long-term decarbonization objectives. According to the International Air Transport Association (IATA), the global aviation industry has committed to achieving net-zero carbon emissions by 2050, with sustainable aviation fuels, new propulsion technologies, operational improvements, and carbon-removal measures forming key components of the transition. The International Energy Agency also identifies aviation as one of the transport sectors where reducing emissions remains particularly challenging, increasing the importance of technologies that can improve aircraft energy efficiency and reduce dependence on conventional fossil fuels. These industry-level decarbonization objectives are encouraging aircraft manufacturers, propulsion developers, airlines, and

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technology companies to invest in electric and alternative-energy aircraft concepts. Increasing development of battery-electric propulsion for light aircraft and short-range operations, together with hybrid-electric and hydrogen-based propulsion for applications requiring greater range and payload, is consequently creating a broader pathway for electrification across aviation.

Beyond decarbonization, technological advances in batteries, electric motors, power electronics, fuel cells, lightweight structures, thermal management, and hybrid-electric architectures are expanding the technical feasibility of electric aircraft. Improvements in energy-storage density and electric powertrain efficiency are particularly important because aircraft performance is highly sensitive to system weight and available onboard energy. Battery-powered aircraft are therefore being developed primarily for shorter-range applications, while hybrid-electric configurations can combine electric propulsion with conventional or alternative energy sources to extend operating range and payload capabilities. Hydrogen-powered aircraft are also attracting investment because hydrogen fuel cells can potentially provide zero-carbon propulsion at the point of use when hydrogen is produced using low-carbon energy. At the same time, the development of charging infrastructure, hydrogen production and distribution networks, airport energy systems, aircraft certification frameworks, and advanced propulsion components is creating the supporting ecosystem required for commercial deployment. Emerging applications in regional connectivity and advanced air mobility are further stimulating research into electric propulsion, particularly where shorter routes and frequent operations can align with the current capabilities of electric powertrains. Growing collaboration among aircraft manufacturers, aerospace suppliers, battery developers, energy companies, airports, research institutions, and regulators is accelerating technology development and certification efforts. Continued improvements in energy efficiency, lightweight aircraft design, autonomous and digitally optimized flight operations, alternative aviation energy systems, and low-emission regional transportation are expected to support the long-term expansion of the global electric aircraft market through 2036.

Global Electric Aircraft Market: Key Highlights

The global electric aircraft market is expected to reach USD 10.61 Billion in 2025, thanks to the growing aviation decarbonization initiatives, advancements in electric propulsion, increasing investments in sustainable aviation technologies, and rising demand for lower-emission aircraft.

The market is estimated to reach USD 18.96 Billion by 2036 with a CAGR of

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5.42% during 2026-2036. Growth is driven by continued development of electric powertrains, advanced batteries, hybrid-electric architectures, hydrogen propulsion and supporting aviation infrastructure.

The global electric aircraft market is expected to be dominated by North America due to its advanced aerospace capabilities, large investments in electric aviation technologies, established aircraft development programs, and increasing focus on sustainable aviation.

Asia Pacific is expected to be the fastest growing region during 2026-2036, owing to increasing demand for aviation, increasing investments in sustainable transportation technologies, growing aerospace manufacturing capabilities and development of electric and alternative-fuel aircraft.

Battery powered aircraft are anticipated to be a significant technology sector, especially for shorter range applications, where advances in battery energy density, electric motors, power electronics and thermal management can contribute to commercial viability.

Hybrid-electric technology is expected to gain strong traction as aircraft developers look to combine electric propulsion with conventional energy sources to improve efficiency, while enabling greater range and payload capabilities.

Manufacturers and technology developers are considering hydrogen fuel cells and hydrogen-based propulsion as potential means of reducing aviation emissions for longer-range applications, and hydrogen-powered aircraft are likely to receive increasing interest.

Light & Ultralight Aircraft are expected to be a leading type segment, due to their relatively lower energy requirements with the viability of early adoption of electric propulsion, pilot training, recreational flying and short-haul flying.

Business Jets are set to attract greater attention as manufacturers look to electric and hybrid-electric propulsion technologies to enable sustainable private and business aviation.

With improvements in batteries, hydrogen propulsion, electric motors and hybrid-electric systems, low-emission regional aviation is becoming more and more viable and the Regional Transport Aircraft market is set for strong long-term

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growth.

The range below 200 km is likely to be a key part of the range given the suitability of electric propulsion technologies for shorter-distance flights at present and the relatively lower energy requirements of short-range aircraft.

The application segment is anticipated to dominate the commercial segment over the forecast period owing to exploration of electric aircrafts by airlines, regional operators, mobility providers, and aviation companies for sustainable passenger transportation and regional connectivity.

And long-term opportunities are expected to be significant for aircraft manufacturers, propulsion developers, energy technology companies, and aviation infrastructure providers thru 2036, with growing investment expected in advanced batteries, electric motors, power electronics, hydrogen fuel cells, hybrid electric propulsion, lightweight materials, thermal management, charging infrastructure, hydrogen infrastructure, and aircraft certification.

Research Scope & Methodology

The study provides an in-depth strategic analysis of the Global Electric Aircraft Market for the forecast period of 2026-2036. The report assesses market size, revenue estimates, competitive scenario, technological developments, sustainable aviation initiatives, and new investment opportunities influencing the electric aircraft market worldwide. The evaluation includes Technology (Battery-powered, Hybrid-electric, Hydrogen-powered), Type (Light & Ultralight Aircraft, Business Jets, Regional Transport Aircraft), Range (Less than 200 km, 201-500 km, More Than 500 km), Application (Commercial, Military). The regions covered for the purpose of the aviation decarbonization market are North America, Europe, Asia Pacific, and LAMEA. The aviation decarbonization market report provides an in-depth analysis of the aviation decarbonization initiatives, aerospace capabilities, electric aircraft development, sustainable aviation investments, charging infrastructure, hydrogen infrastructure, and aircraft certification activities impacting the growth of the regional market. The report also covers developments in electric motors, advanced batteries, power electronics, hydrogen fuel cells, hybrid-electric propulsion, lightweight materials, thermal management, alternative aviation energy systems which continue to transform the competitive landscape of the global electric aircraft market.

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The research methodology combines both primary and secondary research to provide market intelligence and long term forecasting. The core research consists of conducting structured interviews with aircraft manufacturers, electric propulsion technology developers, battery technology suppliers, aerospace companies, aviation operators, energy technology companies, aviation infrastructure providers, and industry experts across major global markets. Secondary research sources include aviation authorities, government agencies, aerospace organizations, company annual reports, investor presentations, technical publications, sustainable aviation reports and verified market intelligence sources. Market estimates are developed using both top-down and bottom-up approaches and validated thru data triangulation to ensure accuracy of the market and the various market segments. Forecast models include aircraft development programs, electric propulsion uptake, battery technology improvements, sustainable aviation investments, alternative-fuel infrastructure, certification improvements and aviation demand. Competitive benchmarking evaluates electric aircraft portfolios, propulsion technologies, battery and fuel-cell capabilities, geographic presence, research and development investments, strategic partnerships, certification activities, and commercialization programs of leading market participants to provide a comprehensive understanding of the evolving competitive environment within the Global Electric Aircraft Market.

Key Market Segments

By Technology:

Battery-powered

Hybrid-electric

Hydrogen-powered

By Type:

Light & Ultralight Aircraft

Business Jets

Regional Transport Aircraft

By Range:

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Less than 200 km

201–500 km

More Than 500 km

By Application:

Commercial

Military

Key Market Players

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AEROVIRONMENT, INC.

EHANG HOLDINGS LTD.

ISRAEL AEROSPACE INDUSTRIES

EVIATION AIRCRAFT INC.

JOBY AVIATION, INC.

ARCHER AVIATION INC.

VOLOCOPTER GMBH

SZ DJI TECHNOLOGY CO., LTD.

Industry Trends

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Electric propulsion systems are increasingly transforming aircraft development as manufacturers focus on electric motors, power electronics, advanced energy management, and integrated propulsion architectures to improve efficiency and reduce aviation emissions.

Battery technology is becoming a critical factor in electric aircraft development. Improvements in energy density, charging performance, thermal management, battery management systems, and durability are supporting efforts to increase aircraft range and payload capacity.

Hybrid-electric propulsion is gaining importance as aircraft developers seek to combine electric propulsion with conventional energy sources to improve efficiency while overcoming the range limitations associated with fully battery-powered aircraft.

Hydrogen-powered aviation is receiving increasing attention as manufacturers and technology developers explore hydrogen fuel cells and hydrogen-based propulsion for applications requiring greater range and lower lifecycle emissions.

Lightweight materials are becoming increasingly important because reducing aircraft structural weight can improve energy efficiency, payload capacity, and flight range. Manufacturers are exploring advanced composites and lightweight components for electric aircraft architectures.

Thermal management technologies are gaining importance as electric motors, batteries, power electronics, and fuel-cell systems generate heat during operation. Advanced cooling and thermal-control systems are being developed to improve safety, reliability, and overall aircraft performance.

Charging infrastructure is emerging as a critical component of the electric aviation ecosystem. Airports, vertiports, regional aviation facilities, and other operators are increasingly evaluating high-capacity charging systems to support the deployment of battery-powered aircraft.

Hydrogen infrastructure is also gaining importance as the development of hydrogen-powered aircraft requires reliable production, storage, transportation, and refueling capabilities at aviation facilities.

Aircraft certification and regulatory development are becoming increasingly

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important as aviation authorities establish safety, airworthiness, propulsion, battery, hydrogen, and operational requirements for emerging electric aircraft technologies.

Strategic collaborations among aircraft manufacturers, electric propulsion developers, battery companies, hydrogen technology providers, aviation operators, infrastructure companies, and government organizations continue to accelerate innovation. Investments in advanced batteries, electric motors, power electronics, hybrid-electric propulsion, hydrogen fuel cells, lightweight materials, thermal management, charging infrastructure, hydrogen infrastructure, and aircraft certification are expected to support the continued growth of the global electric aircraft market through 2036.

Market Determinants

Increasing Aviation Decarbonization Initiatives: Growing pressure to reduce aviation emissions is encouraging aircraft manufacturers, airlines, governments, and technology providers to invest in electric propulsion and alternative-energy aircraft. Sustainability targets are supporting the development of battery-powered, hybrid-electric, and hydrogen-powered aircraft.

Advancements in Battery and Electric Propulsion Technologies: Improvements in battery energy density, electric motors, power electronics, battery management systems, and thermal management are increasing the feasibility of electric aircraft. Continued technology development is supporting improvements in range, payload capacity, efficiency, and operational performance.

Growing Investments in Hybrid-Electric and Hydrogen Aviation: Increasing research and development spending on hybrid-electric architectures and hydrogen fuel-cell propulsion is expanding opportunities beyond battery-powered aircraft. These technologies are being explored to overcome range and energy-density limitations associated with fully electric propulsion.

Expansion of Supporting Aviation Infrastructure: Development of high-capacity charging systems, hydrogen production and refueling infrastructure, maintenance facilities, and specialized airport capabilities is becoming increasingly important for electric aircraft commercialization. Infrastructure investments are supporting the development of broader electric aviation

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ecosystems.

High Battery Costs and Energy-Density Limitations: Battery weight, energy density, charging requirements, and lifecycle performance remain important challenges for electric aircraft. These limitations can restrict aircraft range, payload capacity, and commercial deployment, particularly for larger and longer-range aircraft.

Complex Certification and Safety Requirements: Electric aircraft require extensive certification and validation related to batteries, electric propulsion, thermal management, hydrogen systems, flight controls, and overall airworthiness. Evolving regulatory requirements and lengthy certification processes can increase development costs and delay commercial deployment.

Opportunity Mapping Based on Market Trends

Expansion of Short-Range Electric Aviation: Increasing adoption of electric propulsion for shorter-distance flights is creating significant opportunities for manufacturers of light aircraft, ultralight aircraft, and regional mobility platforms. Improvements in batteries, electric motors, and energy management are supporting the development of commercially viable short-range electric aircraft.

Advancements in Battery and Electric Propulsion Technologies: Continued development of higher-energy-density batteries, efficient electric motors, power electronics, battery management systems, and thermal management is creating opportunities to improve aircraft range, payload capacity, efficiency, and operational reliability.

Growth of Hybrid-Electric and Hydrogen-Powered Aircraft: Increasing investment in alternative propulsion technologies is creating opportunities for aircraft developers to address the range limitations of battery-powered aircraft. Hybrid-electric and hydrogen-powered platforms can support the development of lower-emission aircraft for applications requiring greater range and payload capacity.

Development of Electric Aviation Infrastructure: Growing deployment of charging facilities, hydrogen refueling infrastructure, specialized maintenance systems, and airport capabilities is creating opportunities across the broader electric

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aviation ecosystem. Companies investing in advanced batteries, electric motors, power electronics, hybrid-electric propulsion, hydrogen fuel cells, lightweight materials, thermal management, charging infrastructure, hydrogen infrastructure, and aircraft certification will be well positioned to capitalize on the continued growth of the global electric aircraft market through 2036.

Value-Creating Segments and Growth Pockets

Battery-Powered Aircraft Lead While Hybrid-Electric Technology Accelerates

Battery-powered aircraft represent the leading technology segment in the Global Electric Aircraft Market, accounting for a tentative 51.8% market share in 2025. Their leadership is supported by the relatively mature development of electric motors, batteries, power electronics, energy-management systems, and associated propulsion technologies compared with other emerging electric aviation architectures. Battery-electric propulsion is particularly suitable for light and ultralight aircraft and other short-range operations where lower energy requirements make the limitations of current battery energy density more manageable. Electric propulsion systems can also provide high drivetrain efficiency, fewer moving components, and potentially lower maintenance requirements, creating attractive economics for applications such as pilot training, recreational aviation, short-distance transportation, and emerging advanced air mobility platforms. Continued improvements in battery chemistry, thermal management, motor efficiency, lightweight structures, and power-control systems are progressively improving the performance of battery-powered aircraft. As certification pathways and demonstration programs advance, the technology is expected to remain a major foundation for the initial commercialization of electric aviation.

Hybrid-electric aircraft are projected to record the fastest growth within the technology segment, expanding at a tentative 7.2% CAGR during 2026–2036. Their growth is supported by the ability to combine electric propulsion with conventional or alternative energy sources, providing a practical pathway toward lower-emission aviation while addressing the range and energy-density limitations associated with fully battery-electric aircraft. Hybrid-electric architectures can allocate electric propulsion to selected phases of flight or combine electric motors with combustion-based or other energy systems to improve overall efficiency and extend operating range. This makes the technology particularly attractive for aircraft categories where payload, endurance, and route flexibility are more demanding than those currently suited to pure battery propulsion. Advances in high-power electric motors, batteries, generators, power electronics,

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thermal management, and intelligent energy-management systems are improving the feasibility of hybrid configurations. Growing industry efforts to develop lower-emission regional aircraft and advanced air mobility platforms are expected to create substantial opportunities for hybrid-electric propulsion throughout the forecast period.

Light and Ultralight Aircraft Lead as Regional Electric Aviation Expands

Light & Ultralight Aircraft dominate the Global Electric Aircraft Market by type, accounting for a tentative 54.6% market share in 2025. These aircraft are well positioned for early electric propulsion adoption because their relatively low weight and energy requirements align more closely with the present capabilities of battery technology. Electric light aircraft can support applications including pilot training, recreational aviation, flight demonstrations, short-distance transportation, and emerging urban and regional mobility concepts. Their comparatively simple propulsion requirements also provide manufacturers with an accessible platform for validating electric motors, batteries, power electronics, thermal-management systems, and aircraft-control technologies before applying these systems to larger aircraft. The potential for quieter operation, lower direct operating emissions, and reduced propulsion-system complexity further supports interest from flight schools and specialized aviation operators. As battery performance improves and electric aircraft certification progresses, light and ultralight platforms are expected to remain an important entry point for broader aviation electrification.

Regional Transport Aircraft are expected to experience the fastest growth within the type segment, registering a tentative 7.0% CAGR during 2026–2036. Increasing interest in low-emission regional aviation is creating opportunities for electric, hybrid-electric, and hydrogen-powered propulsion systems capable of serving short and medium-distance routes. Regional aircraft require greater energy capacity, payload capability, and range than light aircraft, making their electrification more technically challenging but also creating significant long-term opportunities as propulsion technologies mature. Improvements in battery energy density, hydrogen fuel-cell systems, electric motors, power electronics, lightweight structures, and hybrid-electric architectures are progressively expanding the potential operating envelope of larger aircraft. Regional transport aircraft could also benefit from growing demand for improved connectivity between smaller cities and regional airports, particularly where sustainable aviation solutions can reduce emissions and operating costs. Continued investments in demonstrator aircraft, propulsion development, certification, and airport infrastructure are expected to accelerate the segment’s long-term expansion.

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Short-Range Aircraft Lead While 201–500 km Operations Gain Momentum

The Less than 200 km range category is expected to represent the leading range segment in the Global Electric Aircraft Market, accounting for a tentative 49.2% market share in 2025. Its leadership reflects the current suitability of electric propulsion technologies for shorter-distance operations, where relatively lower energy requirements allow battery-powered aircraft to operate within the practical limitations of existing energy-storage systems. Short-range missions are particularly compatible with light aircraft, pilot-training operations, recreational aviation, and emerging advanced air mobility applications. Electric propulsion can provide benefits such as high drivetrain efficiency, lower direct operating emissions, and potentially reduced maintenance requirements, making shorter routes an attractive early market for aircraft electrification. The development of charging infrastructure at airports and smaller aviation facilities is also supporting the viability of short-distance electric operations. As manufacturers continue improving battery systems, electric motors, aircraft efficiency, and thermal management, the less-than-200-km segment is expected to remain an important commercial base for electric aviation.

The 201–500 km range segment is projected to register the fastest growth, expanding at a tentative 6.8% CAGR during 2026–2036. Increasing battery energy density, improvements in aircraft aerodynamic efficiency, hybrid-electric architectures, and more efficient electric motors are expected to progressively extend the practical operating range of electric aircraft. The segment occupies an important position between short-range electric mobility and longer-range aviation because it can potentially support regional connectivity while requiring less energy than conventional longer-distance aircraft. Hybrid-electric systems can further improve range by combining electric propulsion with additional energy sources, while advances in energy-management software and lightweight structures can increase aircraft efficiency. As regional airlines, aircraft manufacturers, and advanced air mobility developers seek commercially viable lower-emission aircraft for routes beyond the initial short-range market, the 201–500 km category is expected to attract increasing investment and development activity.

Commercial Aviation Leads While Military Electrification Gains Strategic Interest

Commercial applications dominate the Global Electric Aircraft Market, accounting for a tentative 72.4% market share in 2025. The segment is supported by growing interest in sustainable passenger transportation, regional connectivity, advanced air mobility, pilot training, recreational aviation, and lower-emission aviation solutions. Airlines, aircraft manufacturers, mobility companies, and aviation technology developers are exploring

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electric propulsion as part of broader efforts to improve energy efficiency and reduce the environmental impact of flight. Commercial applications also provide diverse opportunities for different propulsion architectures, with battery-electric systems suited to shorter routes and hybrid-electric or hydrogen-powered systems offering potential pathways toward greater range and payload capabilities. The emergence of electric vertical takeoff and landing concepts and other advanced air mobility platforms is further expanding the commercial opportunity landscape. Continued investment in aircraft certification, charging infrastructure, energy-storage technologies, electric powertrains, and airport integration is expected to support increasing commercial deployment as propulsion technologies mature.

Military applications are expected to experience the fastest growth within the application segment, registering a tentative 6.4% CAGR during 2026–2036. Defense organizations are increasingly evaluating electric and hybrid-electric propulsion for specialized aircraft, unmanned aerial systems, surveillance platforms, logistics missions, training aircraft, and other applications where improved energy efficiency, lower acoustic signatures, reduced thermal output, and lower operational emissions can provide mission advantages. Hybrid-electric architectures are particularly relevant where military platforms require greater endurance and payload capability while benefiting from electric propulsion during selected operating phases. Advances in batteries, fuel cells, power electronics, energy management, autonomous flight systems, and lightweight materials are expanding the range of potential defense applications. Increasing defense investment in unmanned and autonomous aviation is also creating opportunities for electric propulsion in platforms where endurance, reliability, low observability, and efficient power management are important operational considerations.

Regional Market Assessment

North America Leads Through Advanced Aerospace Capabilities and Electric Propulsion Investments

North America is expected to dominate the Global Electric Aircraft Market, accounting for a tentative 37.8% market share in 2025. The region’s leadership is supported by its advanced aerospace ecosystem, strong aircraft-development capabilities, established aviation manufacturers, and substantial investments in electric propulsion and sustainable aviation technologies. The United States is the primary contributor, with aerospace companies, technology developers, research institutions, and government agencies actively advancing battery-electric, hybrid-electric, and hydrogen-powered aircraft concepts. Investments in high-performance batteries, electric motors, power

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electronics, fuel-cell systems, lightweight materials, and thermal-management technologies are strengthening the regional technology base. The development of charging infrastructure and other airport-level systems is also becoming increasingly important as manufacturers and operators prepare for future electric aircraft deployment. Strong demand for advanced air mobility, regional aviation modernization, and lower-emission aerospace solutions is further encouraging investment across the electric aviation ecosystem, allowing North America to maintain its position as a leading market for electric aircraft development and commercialization.

Asia Pacific Accelerates as Aviation Demand and Sustainable Aircraft Development Expand

Asia Pacific is projected to be the fastest-growing regional market for electric aircraft, registering a 6.2% CAGR during 2026–2036. The region’s expansion is supported by rapidly increasing air-transport demand, growing aerospace manufacturing capabilities, investments in sustainable transportation, and rising development activity surrounding electric and alternative-fuel aircraft. China, Japan, South Korea, India, and other regional economies are increasingly exploring electric propulsion for regional transportation, pilot training, short-distance aviation, and advanced air mobility applications. The region’s large manufacturing base provides opportunities for the development and localized production of batteries, electric motors, power electronics, lightweight aircraft structures, and other critical propulsion components. Growing urbanization and demand for improved regional connectivity are also creating opportunities for electric aircraft and emerging advanced air mobility platforms. Government-backed sustainability initiatives, aerospace research programs, and increasing collaboration among aircraft manufacturers, technology companies, energy providers, and infrastructure developers are expected to accelerate electric aviation development across Asia Pacific.

Europe Advances Through Aviation Decarbonization and Alternative Propulsion Technologies

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