

# The Global eVTOL and Advanced Air Mobility Market 2026-2036

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## Abstracts

The electric vertical take-off and landing (eVTOL) and Advanced Air Mobility (AAM) market represents one of the most significant emerging sectors in global transportation, positioned at the convergence of aerospace engineering, electric propulsion, battery technology, autonomous systems, and digital infrastructure. What began as a conceptual vision — catalysed by Uber Technologies' 2016 "Uber Elevate" announcement — has evolved into a multi-billion-dollar industry attracting investment from aerospace giants, automotive OEMs, technology companies, and sovereign wealth funds.

The market encompasses far more than the aircraft themselves. It is best understood through the "5As" ecosystem framework: Aircraft, Ancillary services (MRO), Airlines (operators), Airports (vertiport infrastructure), and Airspace (air traffic management). This integrated ecosystem generates opportunities across vehicle manufacturing, battery and propulsion supply, composite materials, charging infrastructure, pilot training, ground infrastructure, and regulatory certification.

The industry has coalesced around four principal eVTOL architectures. Multicopter designs (EHang, Volocopter) prioritise simplicity for short urban journeys. Lift+cruise configurations (BETA Technologies, Wisk Aero) separate vertical lift and forward flight for improved cruise efficiency. Vectored thrust designs — tiltrotor (Joby Aviation, Archer Aviation) and tiltwing (Lilium, Dufour Aerospace) — offer the greatest range and speed but increased complexity. The market is now scaling beyond small air taxis; Chinese start-up AutoFlight has demonstrated a five-tonne-class eVTOL carrying up to 10 passengers with 5,700 kg maximum take-off weight, validating that the technology can extend to regional travel, heavy logistics, and emergency response.

The AAM market addresses multiple journey types where eVTOL holds competitive advantage over ground transport: urban private hire (8–16 km), rural rideshare (40–80 km), sub-regional shuttle (100–160 km), cargo delivery (50–100 km), and air ambulance operations. Economic analysis demonstrates eVTOL solutions become most compelling at 40–160 km distances where ground congestion erodes speed advantages of surface transport.

The passenger UAM market is projected to grow from approximately US\$1 billion around 2030 to US\$90 billion annually by 2050, with 160,000 commercial passenger drones in operation worldwide. Investor confidence has been remarkable — funding in eVTOL startups grew from US\$40 million in 2016 to US\$907 million in the first half of 2020 alone, and in 2025 exceeded \$6.5 billion. Four business model archetypes are emerging: system providers seeking vertical integration (Joby, Lilium), service providers (Droniq, Vodafone), hardware providers (Rolls-Royce, Skyports), and ticket brokers commoditising available flights.

Battery technology remains the foremost challenge: current lithium-ion cells deliver 250–300 Wh/kg, but commercially viable operations ultimately require 400–500+ Wh/kg. A roadmap from high-nickel NMC and silicon anodes through lithium-sulfur and solid-state batteries is expected to close this gap. Certification and regulation represent the single greatest determinant of market timing — EASA's SC-VTOL framework, the FAA's certification pathways, CAAC's low-altitude economy strategy, and the UK CAA's Future Flight Challenge programme are the principal regulatory frameworks. Type certification has proven more costly and time-consuming than projected, causing a series of postponed commercialisation targets across the industry.

The market is developing at different speeds globally. North America leads in OEM development and regulatory progress. Europe benefits from EASA's proactive framework. China is emerging as a potentially dominant market through national low-altitude economy policy. The Middle East is investing heavily as part of smart city strategies. New ground infrastructure — vertiports ranging from basic landing pads to full-service urban hubs — requires substantial investment ahead of fleet deployment, creating a "chicken and egg" challenge.

The eVTOL market is entering a critical phase. First commercial air taxi services are expected in 2026–2028, initially at premium price points with limited route networks. The subsequent decade will determine whether the industry achieves the scale economics, autonomous capability, and public acceptance necessary to transition from niche service to mass mobility solution.

The electric vertical take-off and landing (eVTOL) and Advanced Air Mobility (AAM) market is poised for transformative growth over the next decade, driven by converging advances in battery technology, electric propulsion, autonomous systems, composite materials, and digital airspace infrastructure. This comprehensive market research report provides in-depth analysis of the entire eVTOL ecosystem — from aircraft architectures and total cost of ownership through to vertiport infrastructure, air traffic management, regulation, and 10-year market forecasts to 2036.

The report examines the market through the "5As" ecosystem framework providing a holistic assessment of the technologies, companies, investments, and regulatory frameworks shaping this emerging industry. With passenger UAM revenues projected to reach US\$90 billion annually by 2050 and first commercial air taxi services expected from 2026–2028, the report delivers the market intelligence needed by investors, OEMs, suppliers, infrastructure developers, regulators, and strategic planners to navigate this rapidly evolving sector.

Four principal eVTOL architectures are assessed in detail — multicopter, lift+cruise, tiltwing, and tiltrotor — with specifications, performance benchmarks, and comparative analysis across range, speed, hover efficiency, noise, and certification complexity. Six journey use cases are modelled with full economic analysis comparing eVTOL against ground transport alternatives including robotaxis, covering urban private hire, rural rideshare, sub-regional shuttle, cargo delivery, and air ambulance operations.

The battery technology chapter provides extensive coverage of lithium-ion cathode and anode chemistries, silicon anodes, lithium-sulfur, solid-state batteries, and cell-to-pack architectures, with energy density roadmaps and cost trajectories to 2036. Dedicated chapters cover electric motors and propulsion systems (axial flux vs. radial flux, SiC power electronics), composite materials and lightweighting (CFRP, glass fibre, thermoplastics), charging standards (GEACS, CCS), and fuel cell and hybrid-electric powertrains.

Regulation and certification analysis spans EASA SC-VTOL, FAA Part 21/23/135, CAAC low-altitude economy policy, UK CAA Future Flight Challenge, and global certification timeline tracking. Regional market analysis covers North America, Europe, Asia-Pacific, Middle East, Latin America, and Africa with regulatory comparison matrices and market entry timelines.

### **Report contents include:**

Executive summary with key market metrics and forecast summaries

eVTOL architecture analysis: multicopter, lift+cruise, tiltwing, tiltrotor specifications and benchmarking

Six journey use case models with cost, time, and emissions comparisons

Total cost of ownership analysis with extensive sensitivity modelling

Funding, investment trends, business model archetypes, and consolidation outlook

Battery technology deep-dive: Li-ion, silicon anode, Li-S, solid-state, cost and energy density roadmaps

Electric motor and propulsion system analysis: axial flux, radial flux, power electronics

Composite materials: CFRP, supply chain, manufacturing challenges

Charging standards and energy infrastructure

Fuel cell and hybrid-electric propulsion systems

Autonomy roadmap, AI flight systems, sensor fusion, cybersecurity

Regulation and certification: EASA, FAA, CAAC, UK CAA, timeline tracking

Vertiport infrastructure: design concepts, forecasts, security requirements

Air traffic management and UTM/ATM integration

Public perception, noise impact, and social licence

Convergence with drones, eCTOL, robotaxis, MaaS, and China's low-altitude economy

Regional market analysis: six regions with regulatory comparison

10-year market forecasts: unit sales, revenue, battery demand, vertiport deployment, workforce

Scenario analysis: conservative, base case, and optimistic

174 tables, 95 figures, 120+ company profiles

Companies profiled (alphabetical order) include but are not limited to Acodyne, AeroMobil, Air (AIR), Airbus, AltoVolo, Amprius, Archer Aviation, Ascendance Flight Technologies, Autoflight, Avolon, Bell Textron, BETA Technologies, CATL, CORGAN, CycloTech, Daimler (Mercedes-Benz Group), Deutsche Flugsicherung, Deutsche Telekom, Diehl Aviation, Doosan Mobility Innovation, Droni Aerospace, Dronamics, Droniq, Dufour Aerospace, EHang, Electric Power Systems (EPS), Elroy Air, Embention, EMRAX, Enpower Greentech, Enovix, ePropelled, ERC System, Eve Air Mobility, Factorial Energy, Geely, General Electric (GE Aerospace), GKN Aerospace, Group14 Technologies, Groupe ADP, H3X, HES Energy Systems, Hexcel, Honda, Honeywell, Hyundai Motor Group, Intelligent Energy, Ionblox, Jaunt Air Mobility, Joby Aviation, Lillium, Lyten, MAGICALL, magniX, MGM COMPRO, Molicel, Monumo, MVRDV, Natilus, Overair, Pipistrel/Textron eAviation, QuantumScape and more.....

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