

# **Special Mission Aircraft Market by Platform (Military Aviation, Commercial Aviation, UAV), Application (ISR, Command and Control, Combat Support, Air-Launch/Rocket Launch), Payload Type, End-User, Point of Sale and Region - Global Forecast to 2027**

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## **Abstracts**

The special mission aircraft market is projected to grow from USD 15.9billion in 2022 to USD 19.9 billion by 2027, at a CAGR of 4.6%. Aircraft OEMs and component manufacturers are focusing on innovating equipment and components for special missions due to the increasing demand for technologically advanced aircraft from military as well as commercial applications globally. Maintaining and funding innovations and managing fluctuations in aircraft build-rates are expected to result in the dynamic growth of the special mission aircraft market in the long term, particularly for the more fragmented parts of the supply chain and highly capital-intensive aero structure segments.

Application segment is estimated to be the largest and fastest growing market

The need for stealthy monitoring during military operations to drive segment demand. The capability of special mission aircraft to operate quietly and surreptitiously enables them to be used for surveillance, detection, classification, and identification of a maritime target without the target's inhabitants becoming aware of the aircraft's presence. They are used for drug interdiction, locating illegal immigrants, documenting fisheries violations, and detecting the pollution of oceans and rivers.

According to Reuters, during in February 2022, amidst the Russia Ukraine war a remotely piloted U.S. military vehicle called the RQ-4 Global Hawk has flown over the country in circles for hours at a time. The drones' high-altitude, long-distance flights

have coincided with a military build-up by Russia along the Ukrainian border and a flurry of diplomacy among leaders of the United States, Europe, and Russia to avert war.

Increasing transport operations in military expected to drive platform segment demand

Special mission aircraft are used for transportation of military supplies and personnel or are deployed for humanitarian relief operations. These aircraft are used for either strategic or tactical purposes. Other than US, European countries such as France, Germany and Russia are also among the highest investors in military transport aircraft.

In September 2021, The Ministry of Defence (MoD), India on Friday signed an estimated 22,000-crore Indian rupees (USD 2838 million) deal with Airbus Defence and Space S.A., Spain, for 56 C-295MW transport aircraft to replace the Indian Air Force's ageing 56 Avro aircraft that were procured in the 1960s. This is the first project of its kind in which a military aircraft will be manufactured in India under technology transfer by the private sector.

North America likely to emerge as the largest special mission aircraft market

Special mission aircraft are used for various special missions carried out by the military forces such as reconnaissance and surveillance operations. These aircraft are used for either strategic or tactical purposes. The US military is the highest investor military reconnaissance & surveillance aircraft when compared to European countries such as France, Germany, and Russia.

In November 2019, NATO and Boeing agreed on a USD 1 billion contract to modernize the alliance's fleet of AWACS surveillance aircraft, ensuring they continue to support missions till 2035.

The break-up of the profile of primary participants in the special mission aircraft market:

By Company Type: Tier 1 – 49%, Tier 2 – 37%, and Tier 3 – 14%

By Designation: C Level – 55%, Director Level – 27%, and Others – 18%

By Region: North America – 27%, Europe – 55%, Asia Pacific – 9%, Rest of the World – 9%.

## Key Market Players

The special mission aircraft market is dominated by a few globally established players such as The Boeing Company (US), Lockheed Martin (US), Dassault Aviation SA (France), Textron Aviation (US), and Northrop Grumman Corporation (US) among others.

## Research Coverage:

This market study covers special mission aircraft market across various segments and subsegments. It aims at estimating the size and growth potential of this market across different segments based on Platform, Application, Payload Type, End-User, Point of Sale and Region. This study also includes an in-depth competitive analysis of the key players in the market, along with their company profiles, key observations related to their product and business offerings, recent developments undertaken by them, and key market strategies adopted by them.

## Reasons to buy this report:

The report will help the market leaders/new entrants in this market with information on the closest approximations of the revenue numbers for the overall special mission aircraft market. This report will help stakeholders understand the competitive landscape and gain more insights to position their businesses better and to plan suitable go-to-market strategies. The report also helps stakeholders understand the pulse of the market and provides them with information on key market drivers, restraints, challenges, and opportunities.

The report provides insights on the following pointers:

**Market Penetration:** Comprehensive information on special mission aircraft offered by the top players in the market

**Product Development/Innovation:** Detailed insights on upcoming technologies, research & development activities, and new product launches in the special mission aircraft market

**Market Development:** Comprehensive information about lucrative markets – the report analyses the special mission aircraft market across varied regions

**Market Diversification:** Exhaustive information about new products, untapped geographies, recent developments, and investments in the special mission aircraft market

**Competitive Assessment:** In-depth assessment of market shares, growth strategies, products, and manufacturing capabilities of leading players in the special mission aircraft market

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##### 12.3.7.1 Increase in special mission aircraft orders drives growth

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TABLE 181 CHINA: SPECIAL MISSION AIRCRAFT MARKET, BY POINT OF SALE,  
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TABLE 184 JAPAN: SPECIAL MISSION AIRCRAFT MARKET, BY COMMERCIAL  
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12.4.4.1 Need to enhance border surveillance and medical services fuels market

TABLE 194 INDIA: SPECIAL MISSION AIRCRAFT MARKET, BY PLATFORM,  
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TABLE 195 INDIA: SPECIAL MISSION AIRCRAFT MARKET, BY PLATFORM, 2022–2027 (USD MILLION)

TABLE 196 INDIA: SPECIAL MISSION AIRCRAFT MARKET, BY COMMERCIAL AVIATION PLATFORM, 2018–2021 (USD MILLION)

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TABLE 198 INDIA: SPECIAL MISSION AIRCRAFT MARKET, BY MILITARY AVIATION PLATFORM, 2018–2021 (USD MILLION)

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TABLE 200 INDIA: SPECIAL MISSION AIRCRAFT MARKET, BY APPLICATION, 2018–2021 (USD MILLION)

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##### 12.4.5.1 Need to reduce dependence on surveillance drives growth

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TABLE 208 SOUTH KOREA: SPECIAL MISSION AIRCRAFT MARKET, BY COMMERCIAL AVIATION PLATFORM, 2018–2021 (USD MILLION)

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TABLE 210 SOUTH KOREA: SPECIAL MISSION AIRCRAFT MARKET, BY MILITARY AVIATION PLATFORM, 2018–2021 (USD MILLION)

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12.4.6.1 Increase in military spending – major growth factor

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TABLE 236 MIDDLE EAST & AFRICA: SPECIAL MISSION AIRCRAFT MARKET, BY MILITARY AVIATION PLATFORM, 2018–2021 (USD MILLION)

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##### 12.5.2.1 Advancements in aircraft technologies fuel growth

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TABLE 246 TURKEY: SPECIAL MISSION AIRCRAFT MARKET, BY COMMERCIAL AVIATION PLATFORM, 2018–2021 (USD MILLION)

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TABLE 248 TURKEY: SPECIAL MISSION AIRCRAFT MARKET, BY MILITARY AVIATION PLATFORM, 2018–2021 (USD MILLION)

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#### 12.5.3.1 Market growth owed to presence of leading market players

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