Euromonitor International

Aircraft and Spacecraft Industry Global Industry Overview

November 2026

KEY FINDINGS

Aircraft and Spacecraft snapshot
Key findings
Aerospace shifts towards sovereign capacity, supplier control and aftermarket
Our expert's view of Aircraft and Spacecraft in 2025

INTRODUCTION

Top five trends in Aircraft and Spacecraft
Top five trends uncovered
Drivers of consumer markets and impact on Aircraft and Spacecraft
Adjacent industries and how they impact Aircraft and Spacecraft

STATE OF THE INDUSTRY

Sovereign capacity and supply chain control reshape aerospace production growth
Supply chain control and aftermarket mix separate winners as aerospace costs rise
Aftermarket exposure and pricing power drive widening aerospace profit gaps
Export growth shifts towards markets winning defence and nearshore supply chain work
Fleet renewal and defence procurement drive aerospace import growth
Macroeconomic/Industry trends
Defence programmes attract new players as mature aerospace markets consolidate
Aerospace leadership reflects programme scale and sovereign backing, not market size
Western scale, sovereign capacity and supply chain control drive aerospace success

TOP FIVE MARKETS

US aerospace leads on scale, profitability and commercial space launch
Boeing recovery and expanding defence and space programmes lift US aerospace
US aerospace shifts from production recovery to scaling defence and space capacity
France turns Airbus backlog into growth while tightening supply chain control
France brings key aerospace supply in-house as production pressures mount
France strengthens aerospace supply chains as defence and space ambitions expand
German aerospace growth builds on engine strength and rising defence spending
Germany turns engine maintenance into growth despite rising aerospace costs
Germany pivots to defence and MRO growth as high costs pressure aerospace margins
China's aerospace output surges as domestic aircraft and space capacity expand
China builds aerospace scale fast, but export controls and thin margins limit gains
China shifts from imported technology towards a self-reliant aerospace ecosystem
UK aerospace output gains pace on widebody engines, wings and defence demand
UK aerospace profits recover as export strength meets rising cost pressures
UK aerospace turns engine data and defence programmes into new growth venues

CONCLUSION

Opportunities for growth
Definitions

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Content ranges from the in-depth and country-specific, to key strategic themes with a global range and significance. Products cover a comprehensive range of insights and market data, but can be broadly categorised as:

- Strategy Briefings: Global or regional in scope, and focussing on the most important themes shaping consumer demand, the

key markets, competitive environment and future outlook across a range of industries.

- Company Profiles: Analysis dedicated to the world's most significant companies, with detailed insight into their activities, focus of operations, their competitors, their geographic presence and performance.
- Country Reports: For an in-depth understanding of specific countries, whether by industry, economic metrics or consumer trends and lifestyles. These reports cover current trends, consumer demand, market potential and future prospects, with country-specific local insight and comprehensive data, unavailable elsewhere.

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