

URBAN AIR MOBILITY MARKET

GLOBAL FORECAST TO 2035

REPORT BROCHURE WITH SAMPLE PAGES





INTRODUCTION

1.1 STUDY OBJECTIVES

- To define, describe, segment, and forecast the urban air mobility market based on solution, mobility type, platform architecture, range, mode of operation, end user, and region
- To forecast various segments of the market with respect to five major regions: North America, Europe, Asia Pacific, Latin America, and the Rest of the World (ROW), along with major countries in each of these regions
- To identify and analyze key drivers, restraints, opportunities, and challenges influencing the growth of the market across the globe.
- To identify industry trends, market trends, and technology trends that are currently prevailing in the market
- To provide an overview of the regulatory landscape with respect to urban air mobility regulations across regions
- To analyze micromarkets¹ with respect to individual growth trends, prospects, and their contribution to the overall market
- To analyze opportunities in the market for stakeholders by identifying key market trends
- To profile key market players and comprehensively analyze their market shares and core competencies²
- To analyze the degree of competition in the market by identifying key growth strategies, such as, investments, agreements, acquisitions, contracts, and partnerships, adopted by leading market players
- To identify detailed financial positions, key products, and unique selling points of leading companies in the market
- To provide a detailed competitive landscape of the market, along with market ranking analysis, market share analysis, and revenue analysis of key players

1.2 MARKET DEFINITION

Urban air mobility (UAM) can be defined as an aerial mode of intracity or intercity transportation of passengers and cargo using manned or electrical-unmanned aerial vehicles. This transportation is limited to 20 to 100 km for intracity and 100 to 400 km for intercity travel. UAM offers a combination of onboard/ground-piloted and increasingly autonomous operations and is safe and effective for air passenger and cargo transport in urban areas, including small package delivery and other urban unmanned aircraft system (UAS) services.



INTRODUCTION

1.3 STUDY SCOPE

FIGURE 1 URBAN AIR MOBILITY MARKET SEGMENTATION

Note: The Middle East includes Gulf Cooperation Council (GCC) (UAE and Saudi Arabia) and Turkey. Africa includes South Africa, Kenya and Rwanda.

Source: Interviews with Experts, Secondary Research, and MarketsandMarkets Analysis



INTRODUCTION

1.3.1 YEARS CONSIDERED



Note: For company profiles where financials for the base year are not available, financials for the previous year have been considered.

1.4 CURRENCY CONSIDERED

The currency used in the report is the United States Dollar (USD), with the market size indicated in USD million/billion. Its value is assumed to remain constant during the forecast period (2024-2035). The base year considered for currency conversion is 2023.

- Revenue figures have been sourced from company annual reports.
- For companies reporting their revenues in currencies other than USD, average annual currency conversion rates have been used to convert values to USD equivalents.

1.5 STAKEHOLDERS

- UAM solution providers
- UAM manufacturers
- Subsystem manufacturers
- Technology support providers
- Logistics and transport solution providers
- Regulatory authorities
- UAS software/hardware/service providers
- Maintenance, repair, and overhaul (MRO) service providers

1.6 SUMMARY OF CHANGES

- Market Overview: The study includes business model, technology analysis, investment and funding scenario, total cost of ownership, and Generative AI impact.
- The forecast period has been changed to 2024–2035 in this version, while the earlier version had 2023–2030 as the forecast period.
- The new edition of the report provides updated information (until July 2024, based on availability) for each listed public company.
- Competitive Landscape: In the latest version, the company evaluation matrix has been updated. It also consists of the key player strategies/right to win, brand/product comparison, revenue analysis, company footprint, competitive benchmarking, company valuation, and financial metrics.



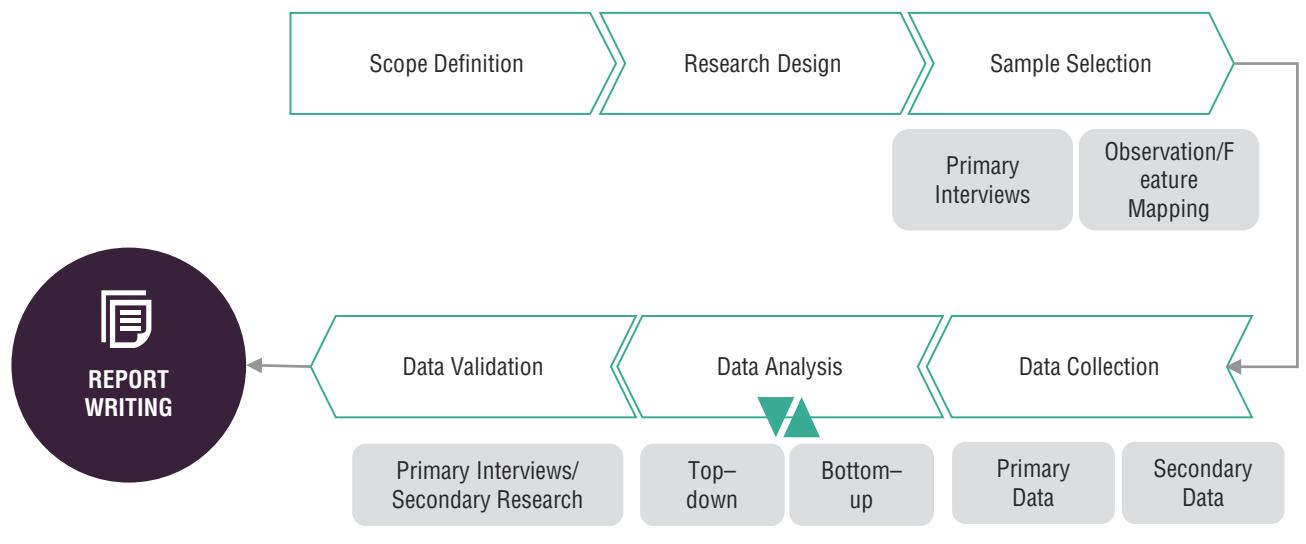
RESEARCH METHODOLOGY

2.1 RESEARCH DATA

This research study involves the extensive use of secondary sources, directories, and databases, such as D&B Hoovers, Bloomberg Businessweek, and Factiva, to identify and collect information relevant to the urban air mobility (UAM) market. Primary sources include industry experts from the core and related industries, as well as preferred suppliers, manufacturers, solution providers, technology developers, alliances, and organizations related to all the segments of this industry's value chain. All primary sources have been interviewed to obtain and verify critical qualitative and quantitative information and assess prospects for market growth during the forecast period.

The following figure showcases the research methodology applied in developing this report on the UAM market.

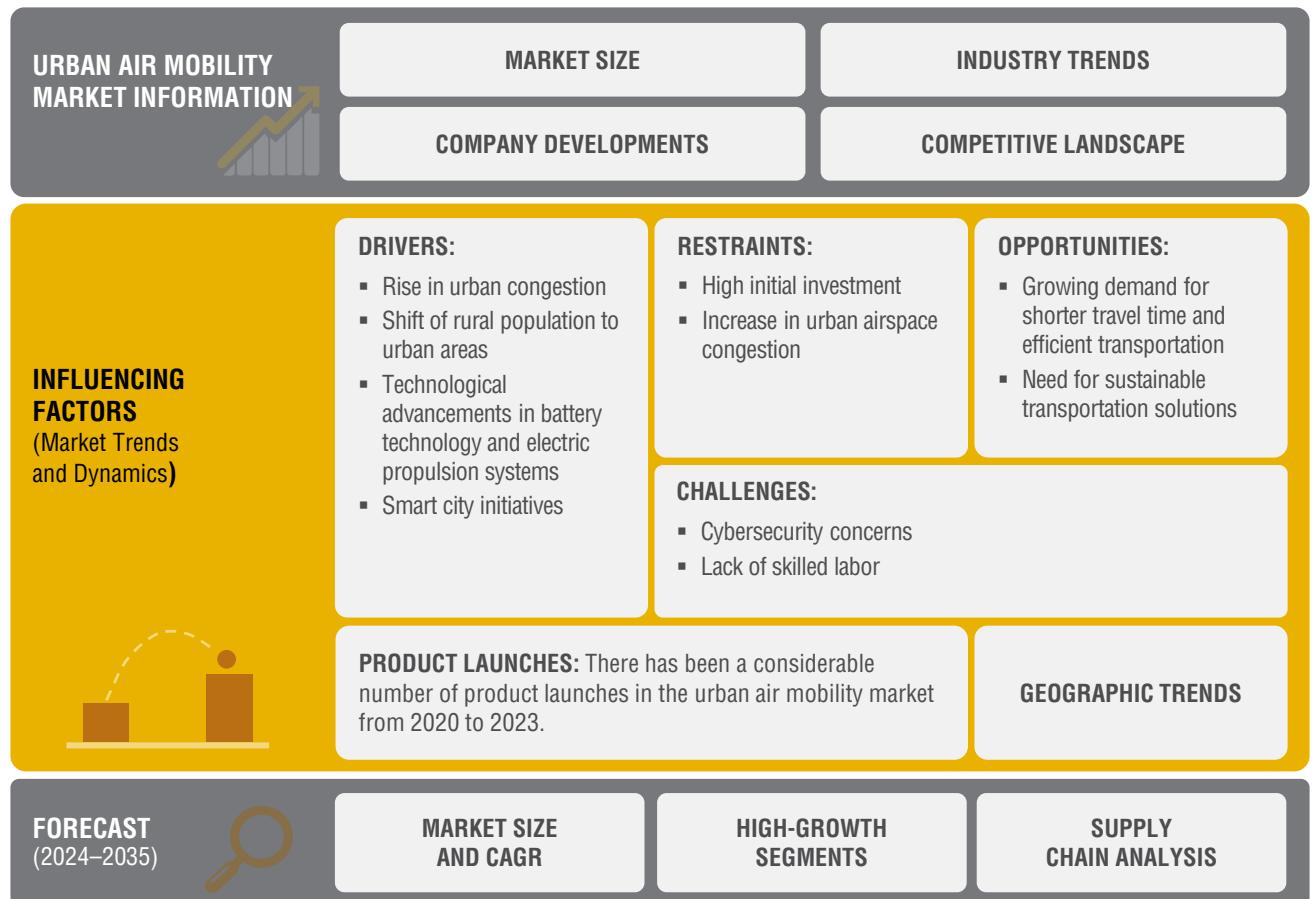
FIGURE 2 RESEARCH PROCESS FLOW





RESEARCH METHODOLOGY

FIGURE 3 RESEARCH DESIGN



Source: Secondary Research and MarketsandMarkets Analysis



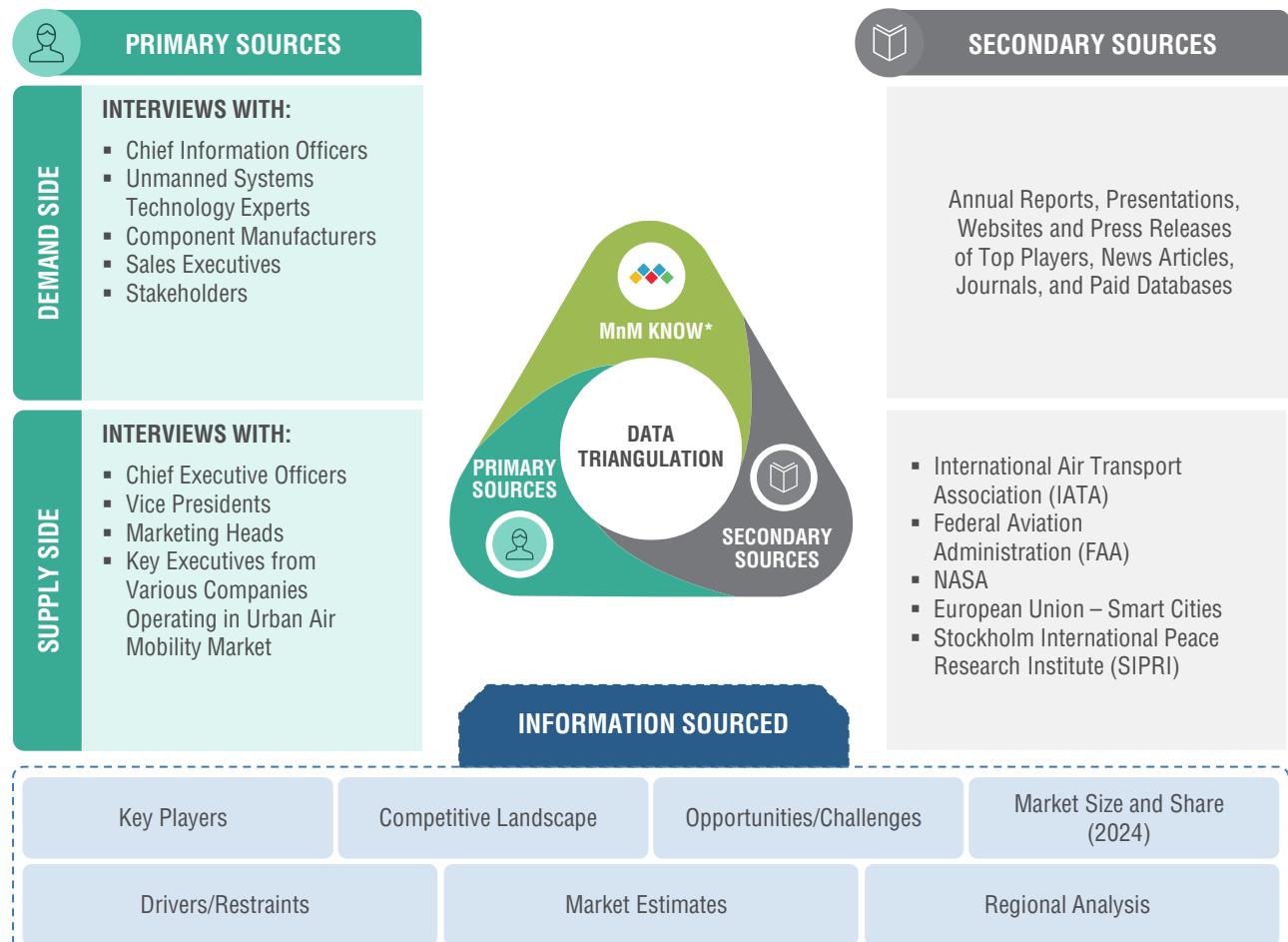
RESEARCH METHODOLOGY

2.2 DATA TRIANGULATION

After arriving at the overall size of the UAM market from the market size estimation process explained above, the total market has been split into several segments and subsegments. To complete the overall market engineering process and arrive at the exact statistics for various market segments and sub-segments, the data triangulation and market breakdown procedures explained below have been implemented, wherever applicable. The data has been triangulated by studying various factors and trends from both the demand and supply sides. The market size has also been validated using top-down and bottom-up approaches.

The following figure indicates the market breakdown structure and the data triangulation procedure implemented in the market engineering process used to develop this report.

FIGURE 4 DATA TRIANGULATION



*MnM KNOW stands for MarketsandMarkets' 'Knowledge Asset Management' framework. In this context, it stands for the existing market research knowledge repository of over 5,000 granular markets, our flagship competitive intelligence and market research platform "Knowledge Store," subject matter experts, and independent consultants. MnM KNOW acts as an independent source that helps us validate information gathered from primary and secondary sources.

The figure above depicts the core data triangulation procedure used in this report for every market, submarket, and subsegment. The percentage splits of various segments, including solution, mobility type, platform architecture, mode of operation, range, end user, and region, have been used to determine the size of the UAM market.



RESEARCH METHODOLOGY

2.3 RISK ASSESSMENT

DESCRIPTION	RISK
The CAGR of the UAM market has been calculated based on historical data and the current scenario of orders.	Low-to-moderate
The commercialization of eVTOLs based on UAM has been estimated for 2023 onwards, considering factors such as the current stage of development and the expected technological developments	Moderate

2.4 RESEARCH LIMITATIONS

The following are the limitations of this research study on the urban air mobility market:

PARAMETER	LIMITATION
REVENUES OF MARKET PLAYERS	Some companies in urban air mobility market are privately-owned and, thus, their revenues are not available in the public domain. Hence, market revenues for these companies have not been included in this report.
PRIMARY INTERVIEWS	Limited positive responses have been received from primaries due to the sensitive nature of the information. Some primaries are reluctant to share quantitative information and sales volume data.
PRICING	The cross referencing of supplier pricing valuation with primary respondents is limited due to multiple indefinite-delivery/indefinite-quantity (IDIQ) contracts and non-disclosure of information.
AVAILABILITY OF DATA	As the market is not yet completely commercialized, and a fair number of developments are made by researchers across the aviation industry and government organizations, data availability is limited.

TABLE OF CONTENTS

1 INTRODUCTION (PAGE NO. 35)

- 1.1 Study Objectives
- 1.2 Market Definition
- 1.3 Study Scope
 - 1.3.1 Years Considered
- 1.4 Inclusions and Exclusions
- 1.5 Currency Considered
- 1.6 Stakeholders
- 1.7 Summary of Changes

2 RESEARCH METHODOLOGY (PAGE NO. 40)

- 2.1 Research Data
 - 2.1.1 Secondary Data
 - 2.1.1.1 Key data from secondary sources
 - 2.1.2 Primary Data
 - 2.1.2.1 Key primary sources
 - 2.1.2.2 Key data from primary sources
- 2.2 Factor Analysis
 - 2.2.1 Introduction
 - 2.2.2 Demand-Side Indicators
 - 2.2.3 Supply-Side Indicators
- 2.3 Market Size Estimation
 - 2.3.1 Bottom-up Approach
 - 2.3.1.1 Market size estimation and methodology
 - 2.3.2 Top-Down Approach
- 2.4 Data Triangulation
- 2.5 Risk Assessment
- 2.6 Research Assumptions
- 2.7 Research Limitations

3 EXECUTIVE SUMMARY (PAGE NO. 51)

4 PREMIUM INSIGHTS (PAGE NO. 54)

- 4.1 Attractive Opportunities for Players in Urban Air Mobility Market
- 4.2 Urban Air Mobility Market, By End User
- 4.3 Urban Air Mobility Market, By Mode of Operation
- 4.4 Urban Air Mobility Market, By Country

5 MARKET OVERVIEW (PAGE NO. 56)

- 5.1 Introduction
- 5.2 Market Dynamics
 - 5.2.1 Drivers
 - 5.2.1.1 Rise in urban congestion
 - 5.2.1.2 Shift of rural population to urban areas
 - 5.2.1.3 Technological advancements in battery technology and electric propulsion systems
 - 5.2.1.4 Smart city initiatives
 - 5.2.2 Restraints
 - 5.2.2.1 High initial investment
 - 5.2.2.2 Increase in urban airspace congestion
 - 5.2.3 Opportunities
 - 5.2.3.1 Growing demand for shorter travel time and efficient transportation
 - 5.2.3.2 Need for sustainable transportation solutions
 - 5.2.4 Challenges
 - 5.2.4.1 Cybersecurity concerns
 - 5.2.4.2 Lack of skilled labor
- 5.3 Value Chain Analysis
- 5.4 Ecosystem Analysis
 - 5.4.1 Prominent Companies
 - 5.4.2 Private and Small Enterprises
 - 5.4.3 End Users
- 5.5 Trends and Disruptions Impacting Customer Business
- 5.6 Trade Analysis
 - 5.6.1 Import Data Statistics
 - 5.6.2 Export Data Statistics
- 5.7 Regulatory Landscape
 - 5.7.1 Regulatory Bodies, Government Agencies, and Other Organizations
- 5.8 Use Case Analysis
 - 5.8.1 Uber's Partnership with Industry Leaders
 - 5.8.2 Amu-Led Performing Real-Life Uam Demonstrations and Flights USing U-Space
 - 5.8.3 Extensive Test Flights By Airbus

TABLE OF CONTENTS

- 5.9 Key Stakeholders and Buying Criteria
 - 5.9.1 Key Stakeholders in Buying Process
 - 5.9.2 Buying Criteria
- 5.10 Key Conferences and Events, 2025
- 5.11 Macroeconomic Outlook
 - 5.11.1 Introduction
 - 5.11.2 North America
 - 5.11.3 Europe
 - 5.11.4 Asia Pacific
 - 5.11.5 Middle East
 - 5.11.6 Latin America
 - 5.11.7 Africa
- 5.12 Bill of Materials
 - 5.12.1 Bill of Materials, By Platform
 - 5.12.2 Bill of Materials, By Urban Air Mobility Infrastructure
- 5.13 Total Cost of Ownership
 - 5.13.1 Total Cost of Ownership for Urban Air Mobility Platform
 - 5.13.2 Total Cost of Ownership for Urban Air Mobility Infrastructure
 - 5.13.3 Total Cost of Ownership Comparison, By Solution
 - 5.13.3.1 For urban air mobility platform
 - 5.13.3.2 For urban air mobility infrastructure
- 5.14 Business Models
 - 5.14.1 Business Models for Urban Air Mobility Platform Operations
 - 5.14.2 Business Models for Urban Air Mobility Infrastructure Operations
- 5.15 Investment and Funding Scenario
- 5.16 Roadmap for Urban Air Mobility Market
- 5.17 Operational Data
 - 5.17.1 Platform Data
 - 5.17.1.1 Key urban air mobility platform order books
 - 5.17.1.2 Key urban air mobility platform noise levels
 - 5.17.1.3 Key urban air mobility platform technology readiness level
 - 5.17.2 Infrastructure Data
 - 5.17.2.1 Stages of unmanned traffic management and unmanned aircraft system research, development, testing, and implementation
- 5.18 Indicative Pricing Analysis
 - 5.18.1 Indicative Pricing Analysis for Urban Air Mobility Platform, By Key Players
 - 5.18.1.1 Pricing analysis: Comparative study of similar price range models (Technology and feature)
 - 5.18.2 Pricing Analysis of Infrastructure and Platform
- 5.19 Technology Roadmap
- 5.20 Impact of AI/Generative Ai on Urban Air Mobility Market
 - 5.20.1 Introduction
 - 5.20.2 Adoption of AI/Generative Ai in Top Countries for Commercial Aviation
- 5.21 Scenario Analysis for Evtol Platforms for Urban Air Mobility
 - 5.21.1 Optimistic Scenario
 - 5.21.2 Optimistic to Realistic Scenario
 - 5.21.3 Pessimistic Scenario

6 INDUSTRY TRENDS (PAGE NO. 106)

- 6.1 Introduction
- 6.2 Technology Trends
 - 6.2.1 Platform
 - 6.2.1.1 Hydrogen propulsion
 - 6.2.1.2 Flight management systems (FMS)
 - 6.2.1.3 Advanced materials and manufacturing techniques
 - 6.2.2 Infrastructure
 - 6.2.2.1 Internet of Things (IoT)
 - 6.2.2.2 Vertically integrated facilities
- 6.3 Technology Analysis
 - 6.3.1 Key Technologies
 - 6.3.1.1 Electric propulsion and battery technology

TABLE OF CONTENTS

6.3.1.2	Lift + cruise configuration	7.2.5.4	Electric pumps
6.3.1.3	Urban air traffic management	7.2.5.5	Distribution devices
6.3.2	Complementary Technologies	7.2.6	Software
6.3.2.1	Robotics	7.3	Infrastructure
6.3.2.2	Charging infrastructure	7.3.1	Vertiports to Lead Segmental Growth
6.3.3	Adjacent Technologies	7.3.2	Charging Stations
6.3.3.1	Application development for urban air mobility	7.3.3	Vertiports
6.4	Impact of Megatrends	7.3.4	Air Traffic Management Facilities
6.4.1	Artificial Intelligence	7.3.5	Maintenance Facilities
6.4.2	Sustainable Aviation Fuel	8	URBAN AIR MOBILITY MARKET, BY PLATFORM ARCHITECTURE (PAGE NO. 131)
6.5	Patent Analysis	8.1	Introduction
7	URBAN AIR MOBILITY MARKET, BY SOLUTION (PAGE NO. 117)	8.2	Rotary Wing
7.1	Introduction	8.2.1	Ability to Offer Direct Access to Congested Areas to Drive Market
7.2	Platform	8.2.2	Helicopters
7.2.1	Propulsion Systems to Drive Segmental Growth	8.2.2.1	Jaunt Air Mobility Journey
7.2.2	Aerostructures	8.2.2.2	Bell 407
7.2.3	Avionics	8.2.3	Multicopters
7.2.3.1	Flight control systems	8.2.3.1	Volocopter VoloCity
7.2.3.2	Navigation systems	8.2.3.2	EHang 216
7.2.3.3	Communications systems	8.3	Fixed-Wing Hybrid
7.2.3.4	Sensors	8.3.1	Ability to Leverage Existing Airport Infrastructure to Drive Market
7.2.3.4.1	Speed sensors	8.3.2	Lift + Cruise
7.2.3.4.2	Light sensors	8.3.2.1	Eve
7.2.3.4.3	Proximity sensors	8.3.2.2	BETA TECHNOLOGIES Alia VTOL
7.2.3.4.4	Position sensors	8.3.3	Vector Thrust
7.2.3.4.5	Temperature sensors	8.3.3.1	Lilium Jet
7.2.4	Propulsion Systems	8.3.3.2	Joby S4
7.2.4.1	Electric Batteries	8.3.3.3	Archer Midnight
7.2.4.2	Solar cells	8.4	Fixed Wing
7.2.4.3	Fuel cells	8.4.1	Demand for Efficient and Long-Range Transportation to Drive Market
7.2.4.4	Hybrid electric	8.4.2	BETA TECHNOLOGIES Alia Ctol
7.2.4.5	Fuel-powered	8.4.3	Electro.Aero
7.2.5	Electrical Systems		
7.2.5.1	Generators		
7.2.5.2	Motors		
7.2.5.3	Electric actuators		

TABLE OF CONTENTS

9 URBAN AIR MOBILITY MARKET, BY MOBILITY TYPE (PAGE NO. 144)

- 9.1 Introduction
- 9.2 Air Taxis
 - 9.2.1 Need for Congestion-Free Transportation in Urban Environments to Drive Market
 - 9.2.2 Manned Taxis
 - 9.2.3 Drone Taxis
- 9.3 Air Shuttles & Air Metro
 - 9.3.1 Growing Urban Population to Generate Demand for Air Metro
- 9.4 Personal Air Vehicles
 - 9.4.1 Rising Demand for Enhanced Personal Mobility to Drive Market
- 9.5 Cargo Air Vehicles
 - 9.5.1 Growing Focus on Light and Heavy Cargo for Intercity and Intracity Deliveries to Drive Market
 - 9.5.2 First-Mile Delivery
 - 9.5.3 Middle-Mile Delivery
 - 9.5.4 Last-Mile Delivery
- 9.6 Air Ambulances & Medical Emergency Vehicles
 - 9.6.1 Need for Rapid Medical Response to Drive Market

10 URBAN AIR MOBILITY MARKET, BY END USER (PAGE NO. 150)

- 10.1 Introduction
- 10.2 Ridesharing Companies
 - 10.2.1 Need for Innovative Solutions to Urban Congestion to Drive Market
- 10.3 Scheduled Operators
 - 10.3.1 Need for Offer Efficient, Reliable, and Scalable Transportation to Drive Market
- 10.4 E-Commerce Companies
 - 10.4.1 Need for Speed and Efficiency in Delivery Services to Drive Market
- 10.5 Hospitals & Medical Agencies
 - 10.5.1 Emergence of Air Ambulances to Drive Market
- 10.6 Private Operators
 - 10.6.1 Demand for Time-Efficient Travel to Drive Market

11 URBAN AIR MOBILITY MARKET, BY MODE OF OPERATION (PAGE NO. 155)

- 11.1 Introduction
- 11.2 Piloted
 - 11.2.1 Traditional Aviation with Modern Electric Propulsion and Vertical Take-off Capabilities
- 11.3 Autonomous
 - 11.3.1 Continuous Improvements in Artificial Intelligence and Sensor Technologies
 - 11.3.2 Remotely/Optionally Piloted
 - 11.3.3 Fully Autonomous

12 URBAN AIR MOBILITY MARKET, BY RANGE (PAGE NO. 159)

- 12.1 Introduction
- 12.2 Intercity (>100 Km)
 - 12.2.1 Advancement in Battery Technology and Hybrid Propulsion Systems to Drive Market
- 12.3 Intracity (<100 Km)
 - 12.3.1 Development of Vertiports to Spur Demand for Intracity Transportation

13 URBAN AIR MOBILITY MARKET, BY REGION (PAGE NO. 162)

- 13.1 Introduction
- 13.2 North America
 - 13.2.1 Introduction
 - 13.2.2 Pestle Analysis
 - 13.2.3 US
 - 13.2.3.1 Development of eVTOL aircraft to drive market
 - 13.2.4 Canada
 - 13.2.4.1 Government initiatives to reduce greenhouse gas emissions to drive market
- 13.3 Europe
 - 13.3.1 Introduction
 - 13.3.2 Pestle Analysis

TABLE OF CONTENTS

13.3.3 UK	13.4.7 Australia
13.3.3.1 Substantial funding and strategic partnerships to drive market	13.4.7.1 Enhancement of regional connectivity and improving access to remote areas to drive market
13.3.4 France	13.4.8 Singapore
13.3.4.1 Establishment of multiple vertiports across Paris to drive market	13.4.8.1 Investment in developing cutting-edge transportation solutions to drive market
13.3.5 Germany	13.4.9 Indonesia
13.3.5.1 Well-established aerospace and automotive industries to drive market	13.4.9.1 Innovative transportation solutions to improve connectivity to drive market
13.3.6 Italy	13.5 Latin America
13.3.6.1 Strong tourism sector to drive market	13.5.1 Introduction
13.3.7 Switzerland	13.5.2 Pestle Analysis
13.3.7.1 Emphasis on R&D of new technologies to drive market	13.5.3 Brazil
13.3.8 Spain	13.5.3.1 Demand for innovative and efficient transportation solutions to drive market
13.3.8.1 Expertise in aerospace engineering to drive market	13.5.4 Mexico
13.3.9 Ireland	13.5.4.1 Strength of public-private partnerships to drive market
13.3.9.1 Supportive regulatory environment to advance UAM technologies to drive market	13.5.5 Argentina
13.3.10 Belgium	13.5.5.1 Green transportation projects to drive market
13.3.10.1 Advancement in aerospace technologies to drive market	13.5.6 Costa Rica
13.4 Asia Pacific	13.5.6.1 Integration of innovative transportation solutions to drive market
13.4.1 Introduction	13.6 Rest of the World
13.4.2 Pestle Analysis	13.6.1 Introduction
13.4.3 China	13.6.2 Middle East
13.4.3.1 Strategic government support to drive market	13.6.2.1 Economic diversification and technological innovation to drive market.
13.4.4 India	13.6.2.2 Gulf Cooperation Council (GCC)
13.4.4.1 Rise in demand for efficient urban transportation solutions to drive market	13.6.2.2.1 Saudi Arabia
13.4.5 Japan	13.6.2.2.2 UAE
13.4.5.1 Focus on advanced technological capabilities to drive market	13.6.2.3 Turkey
13.4.6 South Korea	13.6.2.3.1 Strategic investment in aerospace industry to drive market
13.4.6.1 Government-driven strategic roadmaps and substantial investments to drive market	13.6.3 Africa
	13.6.3.1 Growing middle-class population and increasing air travel demand to drive market

TABLE OF CONTENTS

14 COMPETITIVE LANDSCAPE (PAGE NO. 258)

- 14.1 Introduction
- 14.2 Key Player Strategies/Right to Win
- 14.3 Revenue Analysis
- 14.4 Market Share Analysis
- 14.5 Company Evaluation Matrix: Key Players (By Platform), 2023
 - 14.5.1 Stars
 - 14.5.2 Emerging Leaders
 - 14.5.3 Pervasive Players
 - 14.5.4 Participants
- 14.6 Company Evaluation Matrix: Key Players (By Infrastructure), 2023
 - 14.6.1 Stars
 - 14.6.2 Emerging Leaders
 - 14.6.3 Pervasive Players
 - 14.6.4 Participants
- 14.7 Company Footprint
- 14.8 Company Evaluation Matrix: Startups/SMEs (By Solution), 2023
 - 14.8.1 Progressive Companies
 - 14.8.2 Responsive Companies
 - 14.8.3 Dynamic Companies
 - 14.8.4 Starting Blocks
 - 14.8.5 Competitive Benchmarking: Startups/SMEs, 2023
- 14.9 Company Valuation and Financial Metrics
- 14.10 Competitive Scenario
- 14.11 Market Evaluation Framework
 - 14.11.1 Product Launches and Developments
 - 14.11.2 Deals
 - 14.11.3 Other Developments
- 14.12 Brand Comparison

15 COMPANY PROFILES (PAGE NO. 331)

*(Business overview, Products/Services/Solutions offered, Recent Developments, MNM view)**

- 15.1 Key Players
 - 15.1.1 AIRBUS
 - 15.1.2 EVE HOLDING, INC.
 - 15.1.3 VERTICAL AEROSPACE

- 15.1.4 EHANG
- 15.1.5 ARCHER AVIATION INC.
- 15.1.6 TEXTRON INC.
- 15.1.7 JOBY AVIATION
- 15.1.8 FERROVIAL
- 15.1.9 SKYPORTS INFRASTRUCTURE LIMITED
- 15.1.10 WISK AERO LLC
- 15.1.11 JAUNT AIR MOBILITY LLC.
- 15.1.12 LILIUM GMBH
- 15.1.13 WINGCOPTER
- 15.1.14 BETA TECHNOLOGIES
- 15.1.15 VOLOCOPTER GMBH
- 15.2 Other Players
 - 15.2.1 ARC AERO SYSTEMS
 - 15.2.2 SKYDRIVE INC.
 - 15.2.3 ELECTRA.AERO
 - 15.2.4 AUTOFLIGHT
 - 15.2.5 OVERAIR, INC.
 - 15.2.6 MANTA AIRCRAFT
 - 15.2.7 AIR VEV LTD
 - 15.2.8 URBAN AERONAUTICS LTD.
 - 15.2.9 SKYRYSE, INC.
 - 15.2.10 ASCENDANCE FLIGHT TECHNOLOGIES S.A.S.

*Details on Business overview, Products/Services/Solutions offered, Recent Developments, MNM view might not be captured in case of unlisted companies.

16 APPENDIX (PAGE NO. 419)

- 16.1 Discussion Guide
- 16.2 Company Long List
- 16.3 Knowledgestore: MarketsandMarkets' Subscription Portal
- 16.4 Customization Options
- 16.5 Related Reports
- 16.6 Author Details

TABLES INCLUDED - 468 | FIGURES INCLUDED - 71

(For complete list of tables and figures, pl see Appendix of this Report Brochure)

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1 EXECUTIVE SUMMARY

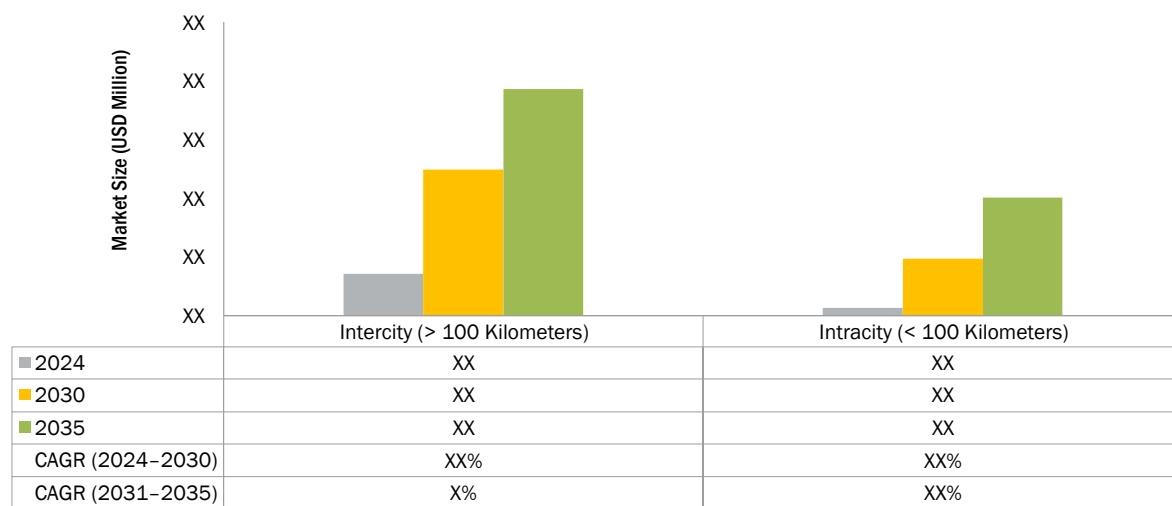
Urban air mobility (UAM) is revolutionizing transportation within cities using advanced aerial technologies. UAM reduces traffic congestion and travel time and enhances overall mobility by utilizing the vertical dimension of cities. Moreover, eVTOL aircraft, powered by electric propulsion systems, offer significant reductions in greenhouse gas emissions and noise pollution compared to traditional transportation methods. UAM can also enhance accessibility, bridging gaps in underserved communities and providing a rapid transportation option for emergency services, such as medical evacuations.

However, the successful integration of UAM faces challenges in terms of the development of robust infrastructure, as the infrastructure for UAM includes vertiports, charging stations, and air traffic management facilities capable of handling a high volume of air traffic. Safety is another critical concern, as UAM aircraft must meet stringent regulatory standards to safeguard passenger and public well-being. Integration into existing urban environments and coordination within airspace alongside other aircraft pose additional complexities. The imposition of restrictions by various government agencies on the use of UAM in civil & commercial applications is also one of the major challenges to the growth of the urban air mobility market.

Several collaborations among industry players, government agencies, urban planners, and communities are being made to establish a supportive ecosystem for safe and efficient UAM operations. Several investments in research & development are being made to advance UAM technology, infrastructure, and sustainability. Governments and regulatory bodies have actively started to engage in establishing a supportive policy framework that balances safety, innovation, and public interests. Conducting pilot projects and feasibility studies in select cities has yielded valuable insights to guide broader UAM implementation.

UAM holds immense potential for revolutionizing urban transportation by offering efficient, sustainable, and accessible air mobility solutions. Though challenges persist regarding infrastructure, regulation, safety, and public acceptance, strategic collaboration, favorable policies, and technological advancements can pave the way for the successful integration of UAM into urban environments. Lilium GmbH (Germany), Archer Aviation Inc. (US), Eve Holding, Inc. (Brazil), Airbus (Netherlands), and EHang (China) are some of the key players in the UAM market.

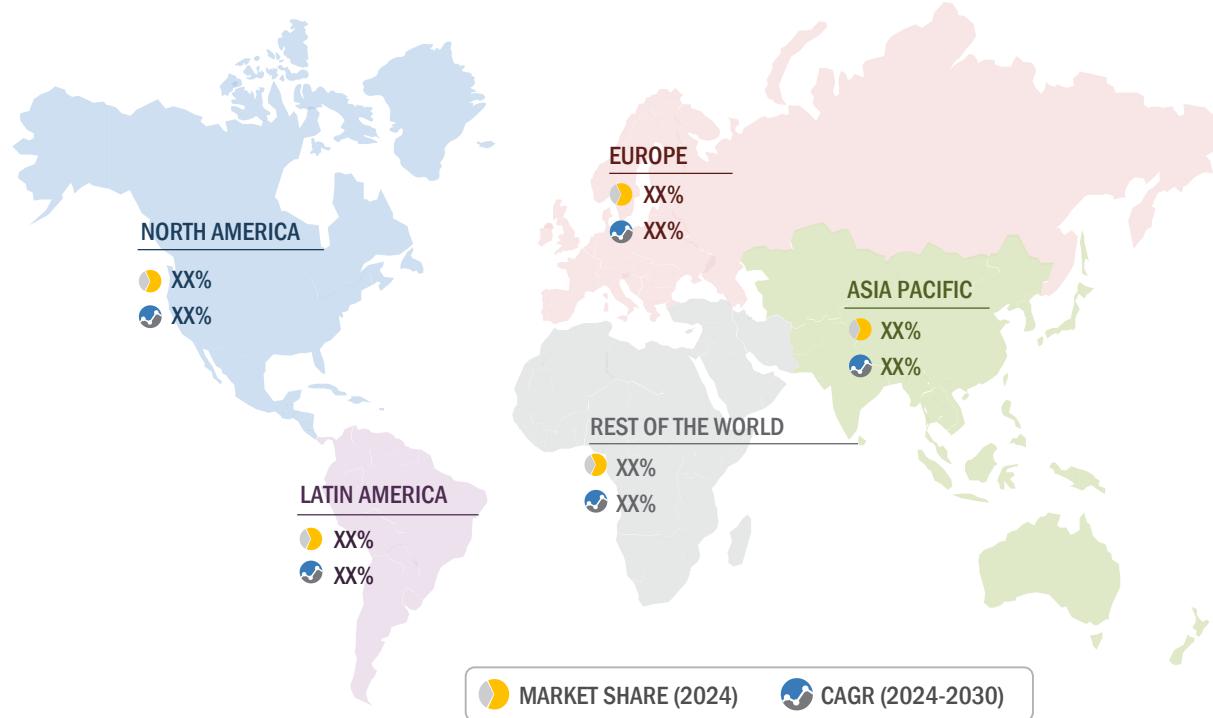
FIGURE 1 INTERCITY (>100 KM) SEGMENT TO HOLD LEADING MARKET SHARE IN 2024



Source: Secondary Research, Interviews with Experts, and MarketsandMarkets Analysis

Based on range, the intercity (>100 km) segment commands a leading market share. The growth of this segment is attributed to the demand for rapid and effective travel between cities, bypassing congested roads. UAM offers shorter travel durations, improved connectivity, and the ability to overcome geographical obstacles, fueling the need for intercity UAM services.

FIGURE 2 NORTH AMERICA TO REGISTER HIGHEST CAGR DURING FORECAST PERIOD



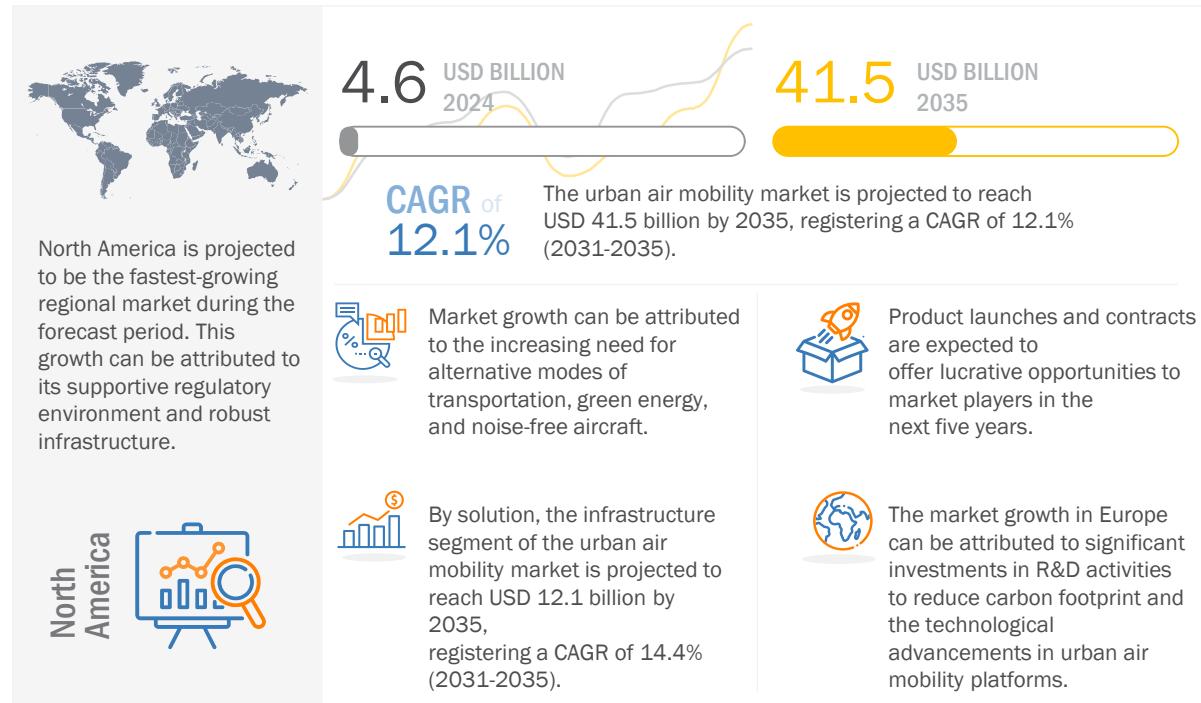
Source: Secondary Research, Interviews with Experts, and MarketsandMarkets Analysis

Based on region, the urban air mobility market has been segmented into North America, Europe, Asia Pacific, Latin America, and the Rest of the World. North America is projected to register the highest CAGR during the forecast period. Increased defense spending by the US and Canada is likely to drive the regional market. The market growth in this region can also be attributed to robust infrastructure, regulatory support, technological investments, dense urban population, and the need for innovative transportation solutions in congested areas.

2 PREMIUM INSIGHTS

2.1 ATTRACTIVE OPPORTUNITIES FOR PLAYERS IN URBAN AIR MOBILITY MARKET

FIGURE 3 NEED FOR ALTERNATIVE MODES OF TRANSPORTATION IN URBAN AREAS TO DRIVE MARKET



Source: Secondary Research, Interviews with Experts, and MarketsandMarkets Analysis



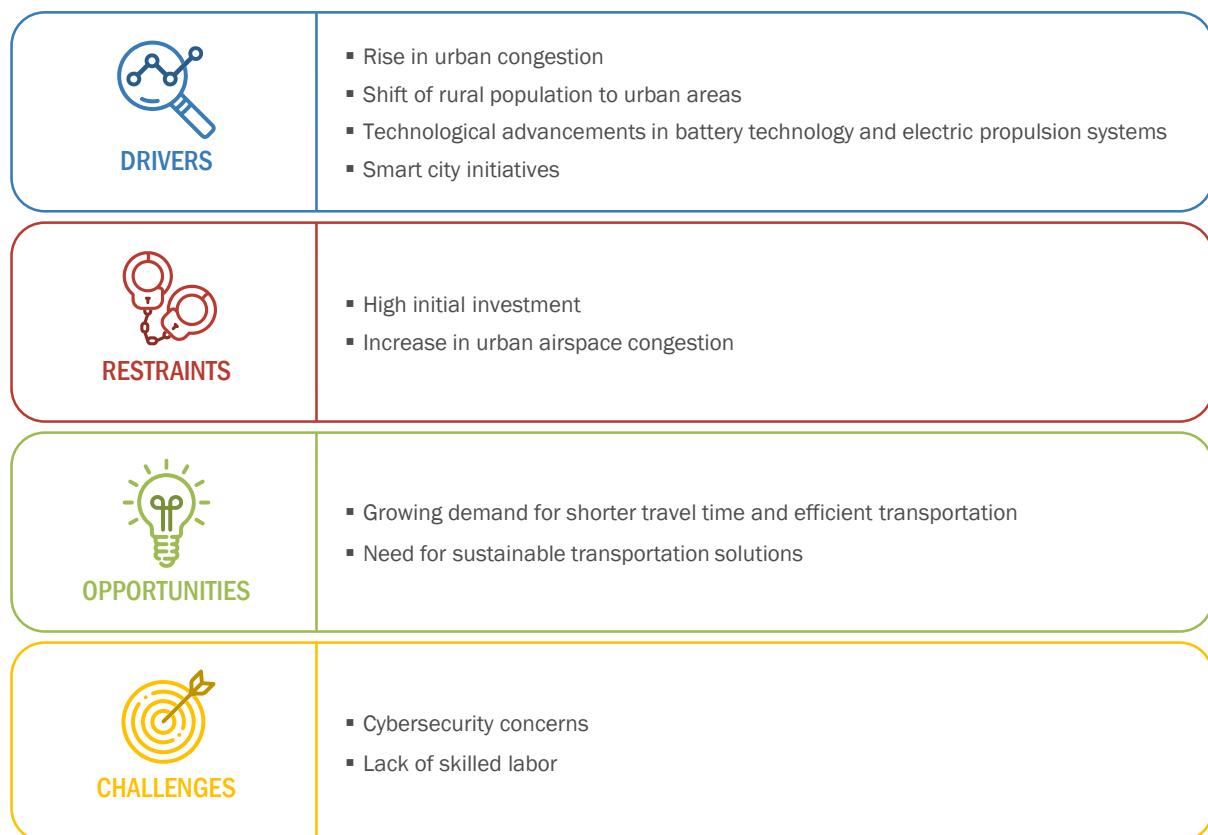
3 MARKET OVERVIEW

3.1 INTRODUCTION

The urban air mobility (UAM) market has evolved considerably over the past decade. UAM is revolutionizing urban transportation by offering faster, more efficient, and environment-friendly alternatives to traditional modes of transportation. This chapter discusses the market dynamics, such as drivers, restraints, opportunities, and challenges pertaining to the UAM market. These factors are expected to influence the growth of the key market players, including Lilium GmbH (Germany), Archer Aviation Inc. (US), Eve Holding, Inc. (US) Airbus (Netherlands), and EHang (China). The market encompasses a range of technologies and services that enable the use of electric-powered aircraft, such as drones and air taxis, for short-distance travel in cities. These aircraft leverage vertical take-off and landing (VTOL) capabilities, bypassing congested roads and utilizing the airspace above urban areas.

3.2 MARKET DYNAMICS

FIGURE 4 URBAN AIR MOBILITY MARKET: DRIVERS, RESTRAINTS, OPPORTUNITIES, AND CHALLENGES



Source: Secondary Research, Interviews with Experts, and MarketsandMarkets Analysis



4 URBAN AIR MOBILITY MARKET, BY SOLUTION

KEY FINDINGS

- The platform segment of the urban air mobility (UAM) market is projected to grow from USD XX million in 2024 to USD XX million by 2030, registering a CAGR of XX% from 2024 to 2030 and XX% from 2031 to 2035.
- The infrastructure segment is projected to reach USD XX million by 2030, from an estimated USD XX million in 2024, at the highest CAGR of XX%.
- The increasing public-private partnerships are driving the solution segment of the UAM market.
- The growing need to support UAM operations is driving the infrastructure solution segment.
- Technological advancements in urban air mobility, such as artificial intelligence, autonomy, and hybrid propulsion systems, are driving the platform solution segment.



4.1 PLATFORM

4.1.1 PROPULSION SYSTEMS TO DRIVE SEGMENTAL GROWTH

Platforms are key components that enable safe and efficient operation in UAM. The platform segment has been further classified into aerostructures, avionics, propulsion systems, electrical systems, and software.

TABLE 1 URBAN AIR MOBILITY MARKET, BY PLATFORM, 2020–2023 (USD MILLION)

Platform	2020	2021	2022	2023	CAGR (2020–2023)
Aerostructures	XX	XX	XX	XX	XX
Avionics	XX	XX	XX	XX	XX
Propulsion Systems	XX	XX	XX	XX	XX
Electrical Systems	XX	XX	XX	XX	XX
Software	XX	XX	XX	XX	XX
Total	XX	XX	XX	XX	XX

Source: Interviews with Experts, Investor Presentations, and MarketsandMarkets Analysis

TABLE 2 URBAN AIR MOBILITY MARKET, BY PLATFORM, 2024–2030 (USD MILLION)

Platform	2024	2025	2026	2027	2028	2029	2030	CAGR (2024–2030)
Aerostructures	XX							
Avionics	XX							
Propulsion Systems	XX							
Electrical Systems	XX							
Software	XX							
Total	XX							

Source: Interviews with Experts, Investor Presentations, and MarketsandMarkets Analysis

TABLE 3 URBAN AIR MOBILITY MARKET, BY PLATFORM, 2031–2035 (USD MILLION)

Platform	2031	2032	2033	2034	2035	CAGR (2031–2035)
Aerostructures	XX	XX	XX	XX	XX	XX
Avionics	XX	XX	XX	XX	XX	XX
Propulsion Systems	XX	XX	XX	XX	XX	XX
Electrical Systems	XX	XX	XX	XX	XX	XX
Software	XX	XX	XX	XX	XX	XX
Total	XX	XX	XX	XX	XX	XX

Source: Interviews with Experts, Investor Presentations, and MarketsandMarkets Analysis

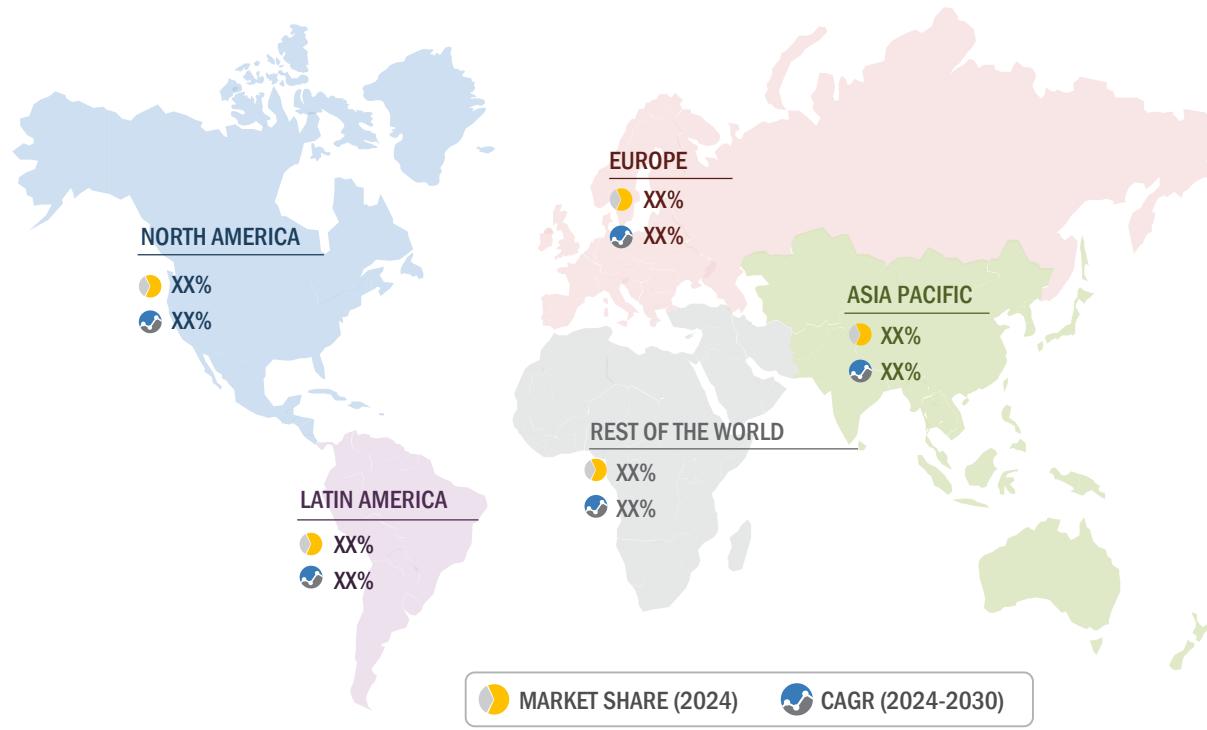
5 URBAN AIR MOBILITY MARKET, BY REGION

5.1 INTRODUCTION

The global urban air mobility (UAM) market has been studied for North America, Europe, Asia Pacific, Latin America, and the Rest of the World.

The growth of the UAM market is influenced by various factors across different regions. In North America, advancements in technology, robust infrastructure, and supportive regulatory frameworks from bodies like the Federal Aviation Administration (FAA), along with significant investments in R&D and demand for efficient urban transport, are driving the market. Europe benefits from strong government and regulatory support, such as EASA's frameworks, and a focus on sustainability and smart city initiatives. The market in the Asia Pacific region is propelled by rapid urbanization, substantial investments in smart cities, and supportive government policies in countries like Japan and China. The Latin American market growth is fueled by increasing urbanization, traffic congestion, and the need for improved transportation infrastructure, with significant interest from international UAM companies and evolving regulatory frameworks. In the Rest of the World, visionary projects and substantial government and private sector investments, particularly in the UAE, are the key market drivers. Each region's unique opportunities and challenges shape the trajectory of UAM integration into its urban transportation ecosystems.

FIGURE 5 NORTH AMERICA TO ACCOUNT FOR LARGEST SHARE OF URBAN AIR MOBILITY MARKET IN 2024



Source: Interviews with Experts, Secondary Research, and MarketsandMarkets Analysis

**TABLE 4** URBAN AIR MOBILITY MARKET, BY REGION, 2020–2023 (USD MILLION)

Region	2020	2021	2022	2023	CAGR (2020–2023)
North America	XX	XX	XX	XX	XX
Europe	XX	XX	XX	XX	XX
Asia Pacific	XX	XX	XX	XX	XX
Latin America	XX	XX	XX	XX	XX
Rest of the World	XX	XX	XX	XX	XX
Total	XX	XX	XX	XX	XX

Source: Secondary Research, Interviews with Experts, and MarketsandMarkets Analysis

TABLE 5 URBAN AIR MOBILITY MARKET, BY REGION, 2024–2030 (USD MILLION)

Region	2024	2025	2026	2027	2028	2029	2030	CAGR (2024–2030)
North America	XX							
Europe	XX							
Asia Pacific	XX							
Latin America	XX							
Rest of the World	XX							
Total	XX							

Source: Secondary Research, Interviews with Experts, and MarketsandMarkets Analysis

TABLE 6 URBAN AIR MOBILITY MARKET, BY REGION, 2031–2035 (USD MILLION)

Region	2031	2032	2033	2034	2035	CAGR (2031–2035)
North America	XX	XX	XX	XX	XX	XX
Europe	XX	XX	XX	XX	XX	XX
Asia Pacific	XX	XX	XX	XX	XX	XX
Latin America	XX	XX	XX	XX	XX	XX
Rest of the World	XX	XX	XX	XX	XX	XX
Total	XX	XX	XX	XX	XX	XX

Source: Secondary Research, Interviews with Experts, and MarketsandMarkets Analysis

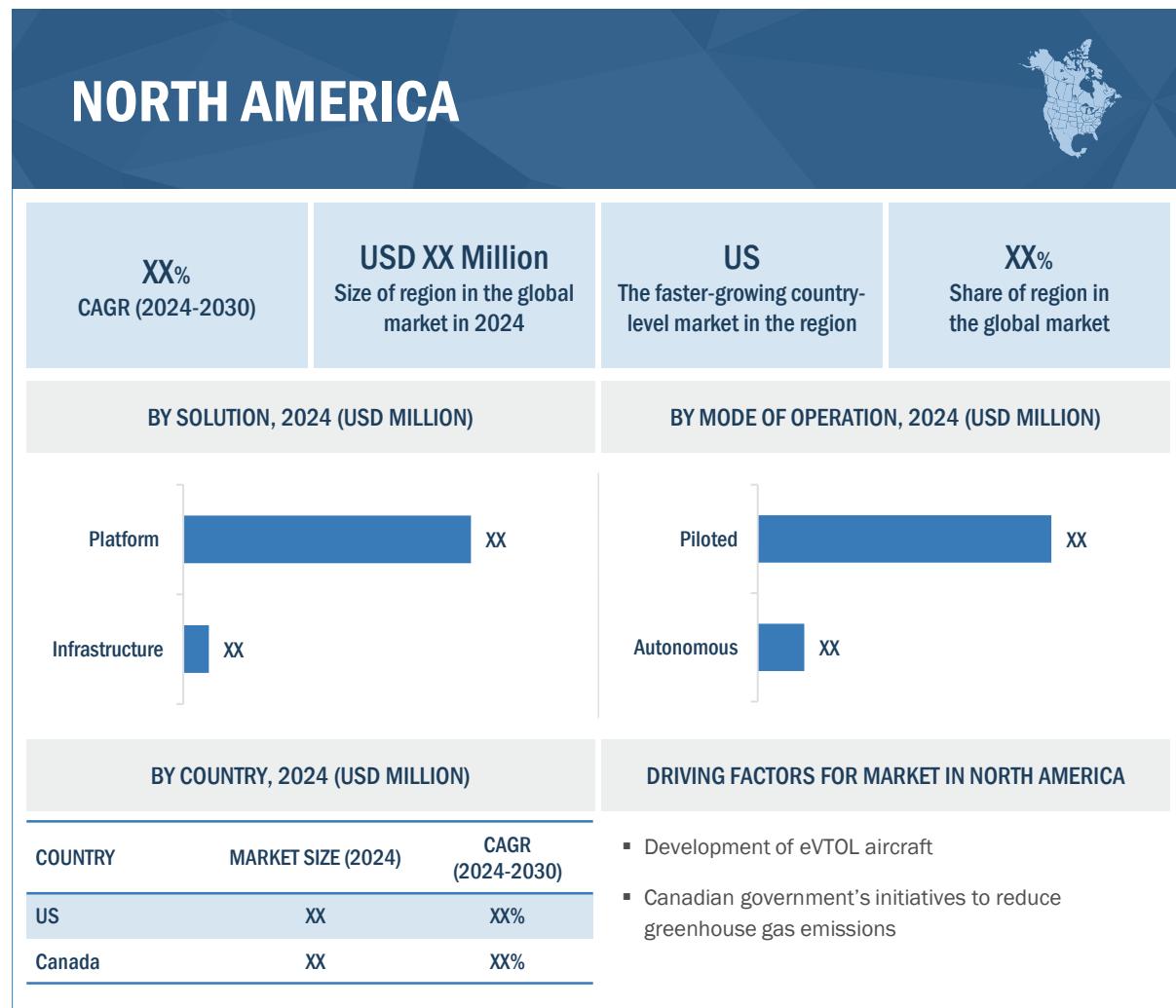


5.2 NORTH AMERICA

5.2.1 INTRODUCTION

The growth of the UAM market in North America is driven by significant advancements in technology, robust infrastructure, and supportive regulatory frameworks. The presence of major aerospace companies and tech innovators, such as Joby Aviation and Uber Elevate, accelerates the development and deployment of UAM solutions. Regulatory support from the FAA, which actively collaborates with industry stakeholders to create safety and operational standards for eVTOL aircraft, is crucial. Substantial investments in R&D and the growing demand for efficient urban transportation solutions are also fueling the market expansion in this region.

FIGURE 6 NORTH AMERICA: URBAN AIR MOBILITY MARKET SNAPSHOT



Source: Secondary Research, Interviews with Experts, and MarketsandMarkets Analysis

**TABLE 7** NORTH AMERICA: URBAN AIR MOBILITY MARKET, BY COUNTRY, 2020–2023 (USD MILLION)

Country	2020	2021	2022	2023	CAGR (2020–2023)
US	XX	XX	XX	XX	XX
Canada	XX	XX	XX	XX	XX
Total	XX	XX	XX	XX	XX

Source: Secondary Research, Interviews with Experts, and MarketsandMarkets Analysis

TABLE 8 NORTH AMERICA: URBAN AIR MOBILITY MARKET, BY COUNTRY, 2024–2030 (USD MILLION)

Country	2024	2025	2026	2027	2028	2029	2030	CAGR (2024–2030)
US	XX							
Canada	XX							
Total	XX							

Source: Secondary Research, Interviews with Experts, and MarketsandMarkets Analysis

TABLE 9 NORTH AMERICA: URBAN AIR MOBILITY MARKET, BY COUNTRY, 2031–2035 (USD MILLION)

Country	2031	2032	2033	2034	2035	CAGR (2031–2035)
US	XX	XX	XX	XX	XX	XX
Canada	XX	XX	XX	XX	XX	XX
Total	XX	XX	XX	XX	XX	XX

Source: Secondary Research, Interviews with Experts, and MarketsandMarkets Analysis

TABLE 10 NORTH AMERICA: URBAN AIR MOBILITY MARKET, BY SOLUTION, 2020–2023 (USD MILLION)

Solution	2020	2021	2022	2023	CAGR (2020–2023)
Infrastructure	XX	XX	XX	XX	XX
Platform	XX	XX	XX	XX	XX
Total	XX	XX	XX	XX	XX

Source: Secondary Research, Interviews with Experts, and MarketsandMarkets Analysis

**TABLE 11** NORTH AMERICA: URBAN AIR MOBILITY MARKET, BY SOLUTION, 2024–2030 (USD MILLION)

Solution	2024	2025	2026	2027	2028	2029	2030	CAGR (2024–2030)
Infrastructure	XX							
Platform	XX							
Total	XX							

Source: Secondary Research, Interviews with Experts, and MarketsandMarkets Analysis

TABLE 12 NORTH AMERICA: URBAN AIR MOBILITY MARKET, BY SOLUTION, 2031–2035 (USD MILLION)

Solution	2031	2032	2033	2034	2035	CAGR (2031–2035)
Infrastructure	XX	XX	XX	XX	XX	XX
Platform	XX	XX	XX	XX	XX	XX
Total	XX	XX	XX	XX	XX	XX

Source: Secondary Research, Interviews with Experts, and MarketsandMarkets Analysis

TABLE 13 NORTH AMERICA: URBAN AIR MOBILITY MARKET, BY MOBILITY TYPE, 2020–2023 (USD MILLION)

Mobility Type	2020	2021	2022	2023	CAGR (2020–2023)
Air Taxis	XX	XX	XX	XX	XX
Air Shuttles and Air Metro	XX	XX	XX	XX	XX
Personal Aerial Vehicles	XX	XX	XX	XX	XX
Air Ambulances & Medical Emergency Vehicles	XX	XX	XX	XX	XX
Cargo Air Vehicles	XX	XX	XX	XX	XX
Total	XX	XX	XX	XX	XX

Source: Secondary Research, Interviews with Experts, and MarketsandMarkets Analysis



6 COMPETITIVE LANDSCAPE

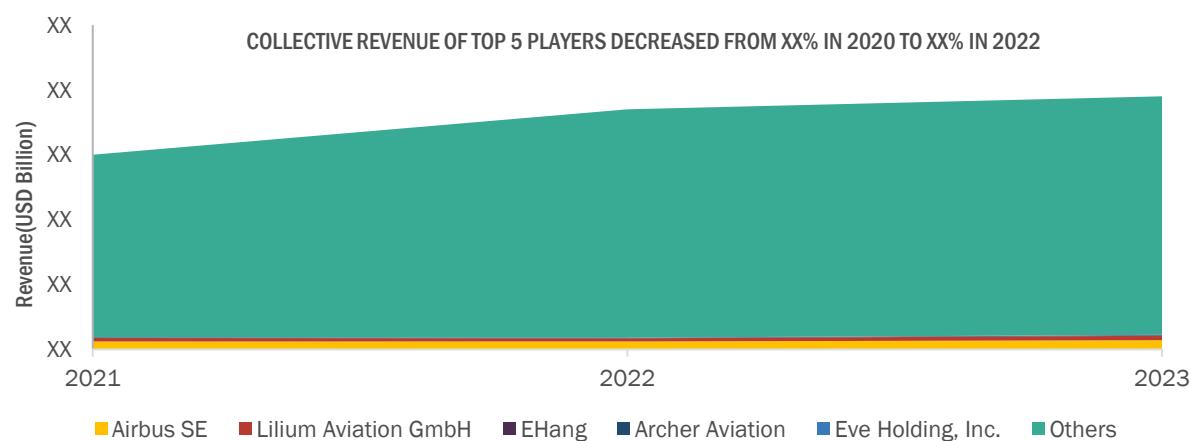
6.1 INTRODUCTION

The competitive landscape chapter provides an overview of the prevailing competitive scenario in the urban air mobility market. It includes a trend analysis based on the revenue of key players in various business segments. It offers a benchmarking of key players' growth strategies and a comprehensive analysis of developments, such as contracts, partnerships, expansions, agreements, collaborations, and product developments undertaken by key players.

6.2 REVENUE ANALYSIS

The revenue mapping of top companies presents an analysis of segments under which the urban air mobility market study was carried out from 2021 to 2023 by these companies. The top 5 companies based on the product portfolio, order book received, and collaborations are identified as Lilium GmbH (Germany), Archer Aviation Inc. (US), Eve Holding, Inc. (Brazil), Airbus (Netherlands), and EHang (China) and others in the urban air mobility market.

FIGURE 7 REVENUE ANALYSIS OF TOP 5 PLAYERS, 2021–2023

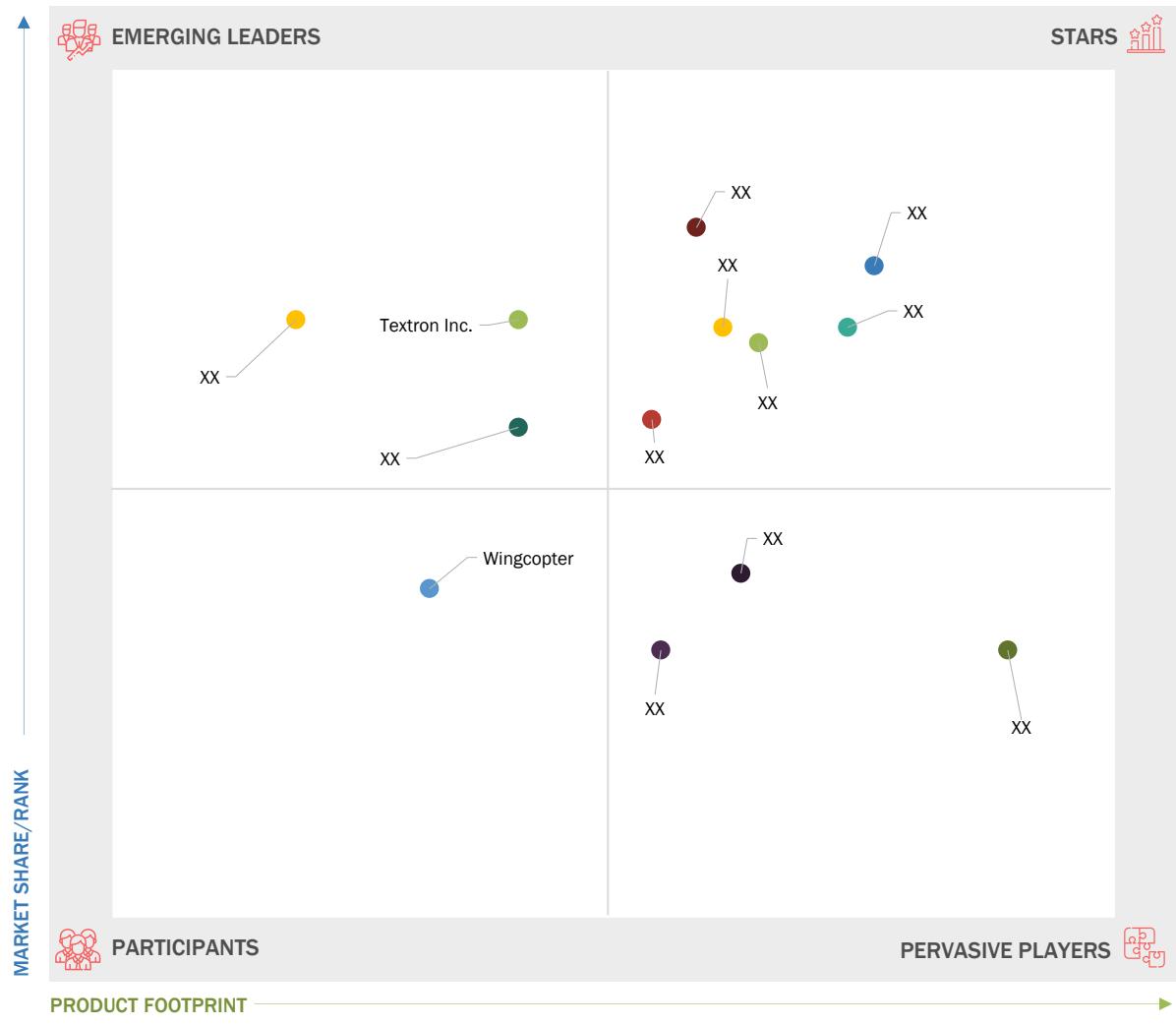


Note: The top 5 players have been analyzed based on the order book they received until 2023. Once the market is commercialized, these players are expected to account for the largest market share.

Source: Annual Reports, Company Websites, Press Releases, and MarketsandMarkets Analysis

6.3 COMPANY EVALUATION MATRIX: KEY PLAYERS (BY PLATFORM), 2023

FIGURE 8 URBAN AIR MOBILITY MARKET: COMPANY EVALUATION MATRIX (KEY PLAYERS) BY PLATFORM, 2023



Source: Secondary Research, Interviews with Experts, and MarketsandMarkets Analysis



7 COMPANY PROFILES

7.1 KEY PLAYERS

7.1.1 AIRBUS

7.1.1.1 Business overview

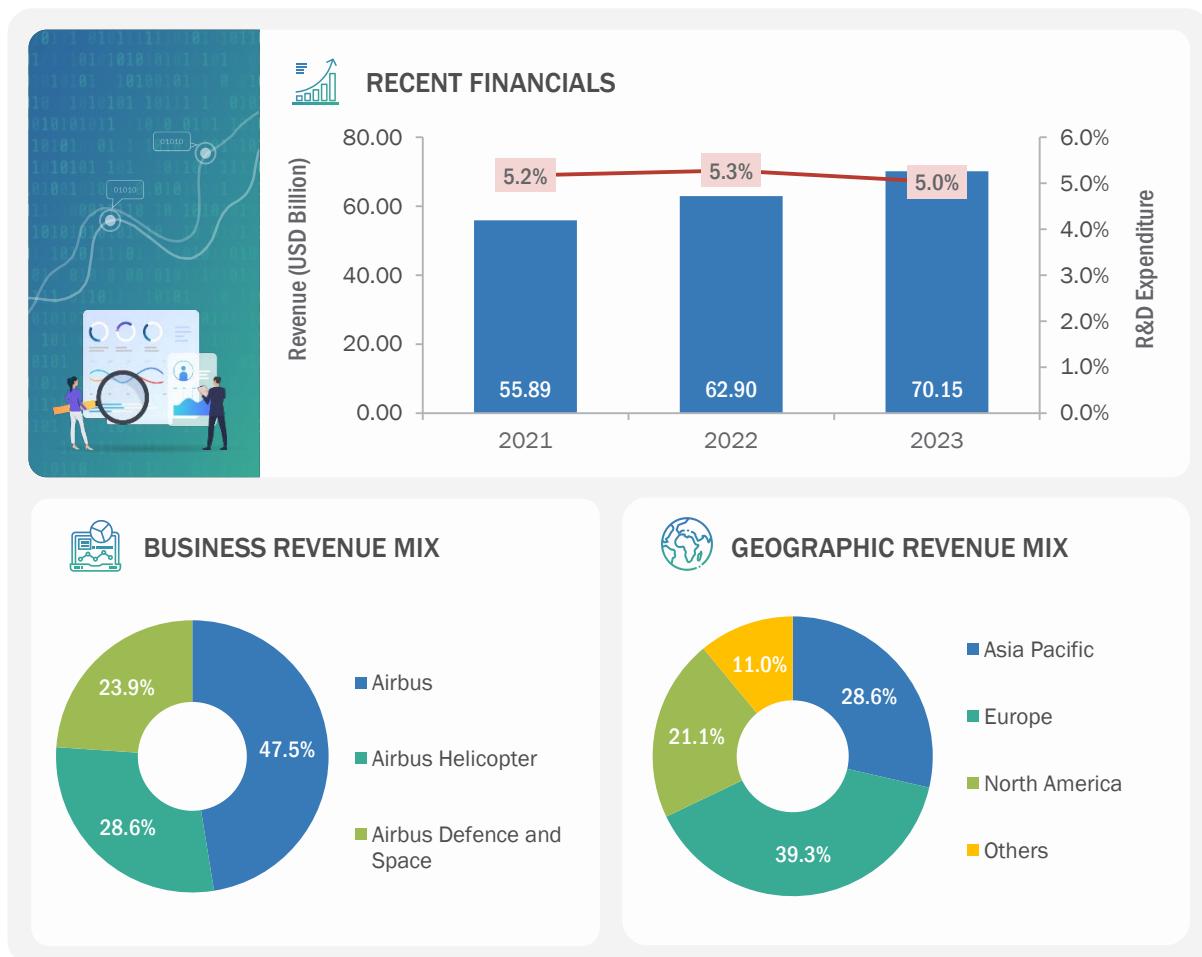
Airbus is a leader in designing, manufacturing, and delivering products and services for space and aviation worldwide. The company operates in three business segments: Airbus Helicopters, Airbus, and Airbus Defense and Space. Through its Under Airbus Helicopters segment, the company provides urban air mobility (UAM)-related products, such as City Airbus electric vertical take-off and landing (eVTOL) aircraft. The products are made with cutting-edge materials. In addition, production processes, such as 3D printing, composites, and robots, are used to maximize their longevity and strength. With a focus on creating sustainable and efficient air transportation systems for urban environments, the company is investing in the research, design, and development of eVTOL aircraft tailored specifically for UAM operations. It is committed to advancing eVTOL technology by integrating cutting-edge electric propulsion systems, autonomous flight capabilities, and innovative design principles. eVTOL aircraft are designed to offer safe and reliable transportation in congested urban areas.

The Airbus Defense and Space business segment is actively involved in the development of UAM solutions. Establishing a comprehensive UAM ecosystem involves the development of necessary infrastructure components. This includes the creation of vertiports or sky ports, which serve as dedicated hubs for UAM vehicle take-off and landing. The company's aim is to establish an interconnected network of vertiports to facilitate efficient passenger and cargo transfers, enhancing the convenience and effectiveness of urban air travel. It employs thousands of highly qualified engineers and technicians and has a presence across Europe, including France, Germany, Spain, and the UK. It works closely with other aerospace businesses and academic organizations on R&D initiatives.

TABLE 14 AIRBUS: COMPANY OVERVIEW

Founding Year	1970
Country	Netherlands
City	Leiden
Employees	147,900
Ownership Type	Public (EPA: AIR)

Source: Company Website

FIGURE 9 AIRBUS: COMPANY SNAPSHOT

Source: Company Website and Annual Reports

APPENDIX

APPENDIX

LIST OF TABLES

TABLE 1	Urban Air Mobility Market: Inclusions and Exclusions	TABLE 43	Urban Air Mobility Market, By Platform Architecture, 2020–2023 (Units)
TABLE 2	USD Exchange Rates	TABLE 44	Urban Air Mobility Market, By Platform Architecture, 2024–2030 (Units)
TABLE 3	Urban Air Mobility Market: Role of Companies in Ecosystem	TABLE 45	Urban Air Mobility Market, By Platform Architecture, 2031–2035 (Units)
TABLE 4	North America: Regulatory Bodies, Government Agencies, and Other Agencies	TABLE 46	Jaunt Air Mobility: Specifications
TABLE 5	Europe: Regulatory Bodies, Government Agencies, and Other Agencies	TABLE 47	Bell 407: Specifications
TABLE 6	Asia Pacific: Regulatory Bodies, Government Agencies, and Other Agencies	TABLE 48	Volocopter Velocity: Specifications
TABLE 7	Region- and Country-Wise Regulations Supporting Urban Air Mobility Ecosystem Development	TABLE 49	Ehang 216: Specifications
TABLE 8	Influence of Stakeholders on Buying Process, By Solution (%)	TABLE 50	Eve: Specifications
TABLE 9	Key Buying Criteria for Urban Air Mobility, By Solution	TABLE 51	BETA TECHNOLOGIES Alia Vtol: Specifications
TABLE 10	Urban Air Mobility Market: Key Conferences and Events, 2025	TABLE 52	Lilium Jet: Specifications
TABLE 11	Total Cost of Ownership Comparison, By Solution	TABLE 53	Joby S4: Specifications
TABLE 12	Urban Air Mobility Platform Operations: Business Model Comparison	TABLE 54	Archer Midnight: Specifications
TABLE 13	Urban Air Mobility Infrastructure Operations: Business Model Comparison	TABLE 55	BETA TECHNOLOGIES Alia Ctol: Specifications
TABLE 14	Key Urban Air Mobility Platform Order Books	TABLE 56	ELECTRA.AERO: Specifications
TABLE 15	Tentative Key Activities Associated with Unmanned Traffic Management Systems	TABLE 57	Urban Air Mobility Market, By Mobility Type, 2020–2023 (USD Million)
TABLE 16	Price Range of Aircraft Models By Key Players	TABLE 58	Urban Air Mobility Market, By Mobility Type, 2024–2030 (USD Million)
TABLE 17	Vertiport Construction Expenditures By System Size: Incremental and Total Expenditure (USD Million)	TABLE 59	Urban Air Mobility Market, By Mobility Type, 2031–2035 (USD Million)
TABLE 18	Major Patents in Urban Air Mobility Market, 2023–2024	TABLE 60	Urban Air Mobility Market, By End User, 2020–2023 (USD Million)
TABLE 19	Urban Air Mobility Market, By Solution, 2020–2023 (USD Million)	TABLE 61	Urban Air Mobility Market, By End User, 2024–2030 (USD Million)
TABLE 20	Urban Air Mobility Market, By Solution, 2024–2030 (USD Million)	TABLE 62	Urban Air Mobility Market, By End User, 2031–2035 (USD Million)
TABLE 21	Urban Air Mobility Market, By Solution, 2031–2035 (USD Million)	TABLE 63	Urban Air Mobility Market, By Mode of Operation, 2020–2023 (USD Million)
TABLE 22	Urban Air Mobility Market, By Platform, 2020–2023 (USD Million)	TABLE 64	Urban Air Mobility Market, By Mode of Operation, 2024–2030 (USD Million)
TABLE 23	Urban Air Mobility Market, By Platform, 2024–2030 (USD Million)	TABLE 65	Urban Air Mobility Market, By Mode of Operation, 2031–2035 (USD Million)
TABLE 24	Urban Air Mobility Market, By Platform, 2031–2035 (USD Million)	TABLE 66	Urban Air Mobility Market, By Range, 2020–2023 (USD Million)
TABLE 25	Urban Air Mobility Market, By Avionics, 2020–2023 (USD Million)	TABLE 67	Urban Air Mobility Market, By Range, 2024–2030 (USD Million)
TABLE 26	Urban Air Mobility Market, By Avionics, 2024–2030 (USD Million)	TABLE 68	Urban Air Mobility Market, By Range, 2031–2035 (USD Million)
TABLE 27	Urban Air Mobility Market, By Avionics, 2031–2035 (USD Million)	TABLE 69	Urban Air Mobility Market, By Region, 2020–2023 (USD Million)
TABLE 28	Urban Air Mobility Market, By Sensors, 2020–2023 (USD Million)	TABLE 70	Urban Air Mobility Market, By Region, 2024–2030 (USD Million)
TABLE 29	Urban Air Mobility Market, By Sensors, 2024–2030 (USD Million)	TABLE 71	Urban Air Mobility Market, By Region, 2031–2035 (USD Million)
TABLE 30	Urban Air Mobility Market, By Sensors, 2031–2035 (USD Million)	TABLE 72	North America: Urban Air Mobility Market, By Country, 2020–2023 (USD Million)
TABLE 31	Urban Air Mobility Market, By Propulsion Systems, 2020–2023 (USD Million)	TABLE 73	North America: Urban Air Mobility Market, By Country, 2024–2030 (USD Million)
TABLE 32	Urban Air Mobility Market, By Propulsion Systems, 2024–2030 (USD Million)	TABLE 74	North America: Urban Air Mobility Market, By Country, 2031–2035 (USD Million)
TABLE 33	Urban Air Mobility Market, By Propulsion Systems, 2031–2035 (USD Million)	TABLE 75	North America: Urban Air Mobility Market, By Solution, 2020–2023 (USD Million)
TABLE 34	Urban Air Mobility Market, By Electrical Systems, 2020–2023 (USD Million)	TABLE 76	North America: Urban Air Mobility Market, By Solution, 2024–2030 (USD Million)
TABLE 35	Urban Air Mobility Market, By Electrical Systems, 2024–2030 (USD Million)	TABLE 77	North America: Urban Air Mobility Market, By Solution, 2031–2035 (USD Million)
TABLE 36	Urban Air Mobility Market, By Electrical Systems, 2031–2035 (USD Million)	TABLE 78	North America: Urban Air Mobility Market, By Mobility Type, 2020–2023 (USD Million)
TABLE 37	Urban Air Mobility Market, By Infrastructure, 2020–2023 (USD Million)	TABLE 79	North America: Urban Air Mobility Market, By Mobility Type, 2024–2030 (USD Million)
TABLE 38	Urban Air Mobility Market, By Infrastructure, 2024–2030 (USD Million)	TABLE 80	North America: Urban Air Mobility Market, By Mobility Type, 2031–2035 (USD Million)
TABLE 39	Urban Air Mobility Market, By Infrastructure, 2031–2035 (USD Million)	TABLE 81	North America: Urban Air Mobility Market, By Mode of Operation, 2020–2023 (USD Million)
TABLE 40	Urban Air Mobility Market, By Platform Architecture, 2020–2023 (USD Million)		
TABLE 41	Urban Air Mobility Market, By Platform Architecture, 2024–2030 (USD Million)		
TABLE 42	Urban Air Mobility Market, By Platform Architecture, 2031–2035 (USD Million)		

APPENDIX

LIST OF TABLES

TABLE 82	North America: Urban Air Mobility Market, By Mode of Operation, 2024–2030 (USD Million)	TABLE 116	Europe: Urban Air Mobility Market, By Mobility Type, 2031–2035 (USD Million)
TABLE 83	North America: Urban Air Mobility Market, By Mode of Operation, 2031–2035 (USD Million)	TABLE 117	Europe: Urban Air Mobility Market, By Mode of Operation, 2020–2023 (USD Million)
TABLE 84	North America: Urban Air Mobility Market, By Range, 2020–2023 (USD Million)	TABLE 118	Europe: Urban Air Mobility Market, By Mode of Operation, 2024–2030 (USD Million)
TABLE 85	North America: Urban Air Mobility Market, By Range, 2024–2030 (USD Million)	TABLE 119	Europe: Urban Air Mobility Market, By Mode of Operation, 2031–2035 (USD Million)
TABLE 86	North America: Urban Air Mobility Market, By Range, 2031–2035 (USD Million)	TABLE 120	Europe: Urban Air Mobility Market, By Range, 2020–2023 (USD Million)
TABLE 87	North America: Urban Air Mobility Market, By End User, 2020–2023 (USD Million)	TABLE 121	Europe: Urban Air Mobility Market, By Range, 2024–2030 (USD Million)
TABLE 88	North America: Urban Air Mobility Market, By End User, 2024–2030 (USD Million)	TABLE 122	Europe: Urban Air Mobility Market, By Range, 2031–2035 (USD Million)
TABLE 89	North America: Urban Air Mobility Market, By End User, 2031–2035 (USD Million)	TABLE 123	Europe: Urban Air Mobility Market, By End User, 2020–2023 (USD Million)
TABLE 90	US: Urban Air Mobility Market, By Solution, 2020–2023 (USD Million)	TABLE 124	Europe: Urban Air Mobility Market, By End User, 2024–2030 (USD Million)
TABLE 91	US: Urban Air Mobility Market, By Solution, 2024–2030 (USD Million)	TABLE 125	Europe: Urban Air Mobility Market, By End User, 2031–2035 (USD Million)
TABLE 92	US: Urban Air Mobility Market, By Solution, 2031–2035 (USD Million)	TABLE 126	UK: Urban Air Mobility Market, By Solution, 2020–2023 (USD Million)
TABLE 93	US: Urban Air Mobility Market, By Mode of Operation, 2020–2023 (USD Million)	TABLE 127	UK: Urban Air Mobility Market, By Solution, 2024–2030 (USD Million)
TABLE 94	US: Urban Air Mobility Market, By Mode of Operation, 2024–2030 (USD Million)	TABLE 128	UK: Urban Air Mobility Market, By Solution, 2031–2035 (USD Million)
TABLE 95	US: Urban Air Mobility Market, By Mode of Operation, 2031–2035 (USD Million)	TABLE 129	UK: Urban Air Mobility Market, By Mode of Operation, 2020–2023 (USD Million)
TABLE 96	US: Urban Air Mobility Market, By Range, 2020–2023 (USD Million)	TABLE 130	UK: Urban Air Mobility Market, By Mode of Operation, 2024–2030 (USD Million)
TABLE 97	US: Urban Air Mobility Market, By Range, 2024–2030 (USD Million)	TABLE 131	UK: Urban Air Mobility Market, By Mode of Operation, 2031–2035 (USD Million)
TABLE 98	US: Urban Air Mobility Market, By Range, 2031–2035 (USD Million)	TABLE 132	UK: Urban Air Mobility Market, By Range, 2020–2023 (USD Million)
TABLE 99	Canada: Urban Air Mobility Market, By Solution, 2020–2023 (USD Million)	TABLE 133	UK: Urban Air Mobility Market, By Range, 2024–2030 (USD Million)
TABLE 100	Canada: Urban Air Mobility Market, By Solution, 2024–2030 (USD Million)	TABLE 134	UK: Urban Air Mobility Market, By Range, 2031–2035 (USD Million)
TABLE 101	Canada: Urban Air Mobility Market, By Solution, 2031–2035 (USD Million)	TABLE 135	France: Urban Air Mobility Market, By Solution, 2020–2023 (USD Million)
TABLE 102	Canada: Urban Air Mobility Market, By Mode of Operation, 2020–2023 (USD Million)	TABLE 136	France: Urban Air Mobility Market, By Solution, 2024–2030 (USD Million)
TABLE 103	Canada: Urban Air Mobility Market, By Mode of Operation, 2024–2030 (USD Million)	TABLE 137	France: Urban Air Mobility Market, By Solution, 2031–2035 (USD Million)
TABLE 104	Canada: Urban Air Mobility Market, By Mode of Operation, 2031–2035 (USD Million)	TABLE 138	France: Urban Air Mobility Market, By Mode of Operation, 2020–2023 (USD Million)
TABLE 105	Canada: Urban Air Mobility Market, By Range, 2020–2023 (USD Million)	TABLE 139	France: Urban Air Mobility Market, By Mode of Operation, 2024–2030 (USD Million)
TABLE 106	Canada: Urban Air Mobility Market, By Range, 2024–2030 (USD Million)	TABLE 140	France: Urban Air Mobility Market, By Mode of Operation, 2031–2035 (USD Million)
TABLE 107	Canada: Urban Air Mobility Market, By Range, 2031–2035 (USD Million)	TABLE 141	France: Urban Air Mobility Market, By Range, 2020–2023 (USD Million)
TABLE 108	Europe: Urban Air Mobility Market, By Country, 2020–2023 (USD Million)	TABLE 142	France: Urban Air Mobility Market, By Range, 2024–2030 (USD Million)
TABLE 109	Europe: Urban Air Mobility Market, By Country, 2024–2030 (USD Million)	TABLE 143	France: Urban Air Mobility Market, By Range, 2031–2035 (USD Million)
TABLE 110	Europe: Urban Air Mobility Market, By Country, 2031–2035 (USD Million)	TABLE 144	Germany: Urban Air Mobility Market, By Solution, 2020–2023 (USD Million)
TABLE 111	Europe: Urban Air Mobility Market, By Solution, 2020–2023 (USD Million)	TABLE 145	Germany: Urban Air Mobility Market, By Solution, 2024–2030 (USD Million)
TABLE 112	Europe: Urban Air Mobility Market, By Solution, 2024–2030 (USD Million)	TABLE 146	Germany: Urban Air Mobility Market, By Solution, 2031–2035 (USD Million)
TABLE 113	Europe: Urban Air Mobility Market, By Solution, 2031–2035 (USD Million)	TABLE 147	Germany: Urban Air Mobility Market, By Mode of Operation, 2020–2023 (USD Million)
TABLE 114	Europe: Urban Air Mobility Market, By Mobility Type, 2020–2023 (USD Million)	TABLE 148	Germany: Urban Air Mobility Market, By Mode of Operation, 2024–2030 (USD Million)
TABLE 115	Europe: Urban Air Mobility Market, By Mobility Type, 2024–2030 (USD Million)	TABLE 149	Germany: Urban Air Mobility Market, By Mode of Operation, 2031–2035 (USD Million)

APPENDIX

LIST OF TABLES

TABLE 150	Germany: Urban Air Mobility Market, By Range, 2020–2023 (USD Million)	TABLE 185	Ireland: Urban Air Mobility Market, By Mode of Operation, 2031–2035 (USD Million)
TABLE 151	Germany: Urban Air Mobility Market, By Range, 2024–2030 (USD Million)	TABLE 186	Ireland: Urban Air Mobility Market, By Range, 2020–2023 (USD Million)
TABLE 152	Germany: Urban Air Mobility Market, By Range, 2031–2035 (USD Million)	TABLE 187	Ireland: Urban Air Mobility Market, By Range, 2024–2030 (USD Million)
TABLE 153	Italy: Urban Air Mobility Market, By Solution, 2020–2023 (USD Million)	TABLE 188	Ireland: Urban Air Mobility Market, By Range, 2031–2035 (USD Million)
TABLE 154	Italy: Urban Air Mobility Market, By Solution, 2024–2030 (USD Million)	TABLE 189	Belgium: Urban Air Mobility Market, By Solution, 2020–2023 (USD Million)
TABLE 155	Italy: Urban Air Mobility Market, By Solution, 2031–2035 (USD Million)	TABLE 190	Belgium: Urban Air Mobility Market, By Solution, 2024–2030 (USD Million)
TABLE 156	Italy: Urban Air Mobility Market, By Mode of Operation, 2020–2023 (USD Million)	TABLE 191	Belgium: Urban Air Mobility Market, By Solution, 2031–2035 (USD Million)
TABLE 157	Italy: Urban Air Mobility Market, By Mode of Operation, 2024–2030 (USD Million)	TABLE 192	Belgium: Urban Air Mobility Market, By Mode of Operation, 2020–2023 (USD Million)
TABLE 158	Italy: Urban Air Mobility Market, By Mode of Operation, 2031–2035 (USD Million)	TABLE 193	Belgium: Urban Air Mobility Market, By Mode of Operation, 2024–2030 (USD Million)
TABLE 159	Italy: Urban Air Mobility Market, By Range, 2020–2023 (USD Million)	TABLE 194	Belgium: Urban Air Mobility Market, By Mode of Operation, 2031–2035 (USD Million)
TABLE 160	Italy: Urban Air Mobility Market, By Range, 2024–2030 (USD Million)	TABLE 195	Belgium: Urban Air Mobility Market, By Range, 2020–2023 (USD Million)
TABLE 161	Italy: Urban Air Mobility Market, By Range, 2031–2035 (USD Million)	TABLE 196	Belgium: Urban Air Mobility Market, By Range, 2024–2030 (USD Million)
TABLE 162	Switzerland: Urban Air Mobility Market, By Solution, 2020–2023 (USD Million)	TABLE 197	Belgium: Urban Air Mobility Market, By Range, 2031–2035 (USD Million)
TABLE 163	Switzerland: Urban Air Mobility Market, By Solution, 2024–2030 (USD Million)	TABLE 198	Asia Pacific: Urban Air Mobility Market, By Country, 2020–2023 (USD Million)
TABLE 164	Switzerland: Urban Air Mobility Market, By Solution, 2031–2035 (USD Million)	TABLE 199	Asia Pacific: Urban Air Mobility Market, By Country, 2024–2030 (USD Million)
TABLE 165	Switzerland: Urban Air Mobility Market, By Mode of Operation, 2020–2023 (USD Million)	TABLE 200	Asia Pacific: Urban Air Mobility Market, By Country, 2031–2035 (USD Million)
TABLE 166	Switzerland: Urban Air Mobility Market, By Mode of Operation, 2024–2030 (USD Million)	TABLE 201	Asia Pacific: Urban Air Mobility Market, By Solution, 2020–2023 (USD Million)
TABLE 167	Switzerland: Urban Air Mobility Market, By Mode of Operation, 2031–2035 (USD Million)	TABLE 202	Asia Pacific: Urban Air Mobility Market, By Solution, 2024–2030 (USD Million)
TABLE 168	Switzerland: Urban Air Mobility Market, By Range, 2020–2023 (USD Million)	TABLE 203	Asia Pacific: Urban Air Mobility Market, By Solution, 2031–2035 (USD Million)
TABLE 169	Switzerland: Urban Air Mobility Market, By Range, 2024–2030 (USD Million)	TABLE 204	Asia Pacific: Urban Air Mobility Market, By Mobility Type, 2020–2023 (USD Million)
TABLE 170	Switzerland: Urban Air Mobility Market, By Range, 2031–2035 (USD Million)	TABLE 205	Asia Pacific: Urban Air Mobility Market, By Mobility Type, 2024–2030 (USD Million)
TABLE 171	Spain: Urban Air Mobility Market, By Solution, 2020–2023 (USD Million)	TABLE 206	Asia Pacific: Urban Air Mobility Market, By Mobility Type, 2031–2035 (USD Million)
TABLE 172	Spain: Urban Air Mobility Market, By Solution, 2024–2030 (USD Million)	TABLE 207	Asia Pacific: Urban Air Mobility Market, By Mode of Operation, 2020–2023 (USD Million)
TABLE 173	Spain: Urban Air Mobility Market, By Solution, 2031–2035 (USD Million)	TABLE 208	Asia Pacific: Urban Air Mobility Market, By Mode of Operation, 2024–2030 (USD Million)
TABLE 174	Spain: Urban Air Mobility Market, By Mode of Operation, 2020–2023 (USD Million)	TABLE 209	Asia Pacific: Urban Air Mobility Market, By Mode of Operation, 2031–2035 (USD Million)
TABLE 175	Spain: Urban Air Mobility Market, By Mode of Operation, 2024–2030 (USD Million)	TABLE 210	Asia Pacific: Urban Air Mobility Market, By Range, 2020–2023 (USD Million)
TABLE 176	Spain: Urban Air Mobility Market, By Mode of Operation, 2031–2035 (USD Million)	TABLE 211	Asia Pacific: Urban Air Mobility Market, By Range, 2024–2030 (USD Million)
TABLE 177	Spain: Urban Air Mobility Market, By Range, 2020–2023 (USD Million)	TABLE 212	Asia Pacific: Urban Air Mobility Market, By Range, 2031–2035 (USD Million)
TABLE 178	Spain: Urban Air Mobility Market, By Range, 2024–2030 (USD Million)	TABLE 213	Asia Pacific: Urban Air Mobility Market, By End User, 2020–2023 (USD Million)
TABLE 179	Spain: Urban Air Mobility Market, By Range, 2031–2035 (USD Million)	TABLE 214	Asia Pacific: Urban Air Mobility Market, By End User, 2024–2030 (USD Million)
TABLE 180	Ireland: Urban Air Mobility Market, By Solution, 2020–2023 (USD Million)	TABLE 215	Asia Pacific: Urban Air Mobility Market, By End User, 2031–2035 (USD Million)
TABLE 181	Ireland: Urban Air Mobility Market, By Solution, 2024–2030 (USD Million)	TABLE 216	China: Urban Air Mobility Market, By Solution, 2020–2023 (USD Million)
TABLE 182	Ireland: Urban Air Mobility Market, By Solution, 2031–2035 (USD Million)		
TABLE 183	Ireland: Urban Air Mobility Market, By Mode of Operation, 2020–2023 (USD Million)		
TABLE 184	Ireland: Urban Air Mobility Market, By Mode of Operation, 2024–2030 (USD Million)		

APPENDIX

LIST OF TABLES

TABLE 217	China: Urban Air Mobility Market, By Solution, 2024–2030 (USD Million)	TABLE 253	Australia: Urban Air Mobility Market, By Solution, 2024–2030 (USD Million)
TABLE 218	China: Urban Air Mobility Market, By Solution, 2031–2035 (USD Million)	TABLE 254	Australia: Urban Air Mobility Market, By Solution, 2031–2035 (USD Million)
TABLE 219	China: Urban Air Mobility Market, By Mode of Operation, 2020–2023 (USD Million)	TABLE 255	Australia: Urban Air Mobility Market, By Mode of Operation, 2020–2023 (USD Million)
TABLE 220	China: Urban Air Mobility Market, By Mode of Operation, 2024–2030 (USD Million)	TABLE 256	Australia: Urban Air Mobility Market, By Mode of Operation, 2024–2030 (USD Million)
TABLE 221	China: Urban Air Mobility Market, By Mode of Operation, 2031–2035 (USD Million)	TABLE 257	Australia: Urban Air Mobility Market, By Mode of Operation, 2031–2035 (USD Million)
TABLE 222	China: Urban Air Mobility Market, By Range, 2020–2023 (USD Million)	TABLE 258	Australia: Urban Air Mobility Market, By Range, 2020–2023 (USD Million)
TABLE 223	China: Urban Air Mobility Market, By Range, 2024–2030 (USD Million)	TABLE 259	Australia: Urban Air Mobility Market, By Range, 2024–2030 (USD Million)
TABLE 224	China: Urban Air Mobility Market, By Range, 2031–2035 (USD Million)	TABLE 260	Australia: Urban Air Mobility Market, By Range, 2031–2035 (USD Million)
TABLE 225	India: Urban Air Mobility Market, By Solution, 2020–2023 (USD Million)	TABLE 261	Singapore: Urban Air Mobility Market, By Solution, 2020–2023 (USD Million)
TABLE 226	India: Urban Air Mobility Market, By Solution, 2024–2030 (USD Million)	TABLE 262	Singapore: Urban Air Mobility Market, By Solution, 2024–2030 (USD Million)
TABLE 227	India: Urban Air Mobility Market, By Solution, 2031–2035 (USD Million)	TABLE 263	Singapore: Urban Air Mobility Market, By Solution, 2031–2035 (USD Million)
TABLE 228	India: Urban Air Mobility Market, By Mode of Operation, 2020–2023 (USD Million)	TABLE 264	Singapore: Urban Air Mobility Market, By Mode of Operation, 2020–2023 (USD Million)
TABLE 229	India: Urban Air Mobility Market, By Mode of Operation, 2024–2030 (USD Million)	TABLE 265	Singapore: Urban Air Mobility Market, By Mode of Operation, 2024–2030 (USD Million)
TABLE 230	India: Urban Air Mobility Market, By Mode of Operation, 2031–2035 (USD Million)	TABLE 266	Singapore: Urban Air Mobility Market, By Mode of Operation, 2031–2035 (USD Million)
TABLE 231	India: Urban Air Mobility Market, By Range, 2020–2023 (USD Million)	TABLE 267	Singapore: Urban Air Mobility Market, By Range, 2020–2023 (USD Million)
TABLE 232	India: Urban Air Mobility Market, By Range, 2024–2030 (USD Million)	TABLE 268	Singapore: Urban Air Mobility Market, By Range, 2024–2030 (USD Million)
TABLE 233	India: Urban Air Mobility Market, By Range, 2031–2035 (USD Million)	TABLE 269	Singapore: Urban Air Mobility Market, By Range, 2031–2035 (USD Million)
TABLE 234	Japan: Urban Air Mobility Market, By Solution, 2020–2023 (USD Million)	TABLE 270	Indonesia: Urban Air Mobility Market, By Solution, 2020–2023 (USD Million)
TABLE 235	Japan: Urban Air Mobility Market, By Solution, 2024–2030 (USD Million)	TABLE 271	Indonesia: Urban Air Mobility Market, By Solution, 2024–2030 (USD Million)
TABLE 236	Japan: Urban Air Mobility Market, By Solution, 2031–2035 (USD Million)	TABLE 272	Indonesia: Urban Air Mobility Market, By Solution, 2031–2035 (USD Million)
TABLE 237	Japan: Urban Air Mobility Market, By Mode of Operation, 2020–2023 (USD Million)	TABLE 273	Indonesia: Urban Air Mobility Market, By Mode of Operation, 2020–2023 (USD Million)
TABLE 238	Japan: Urban Air Mobility Market, By Mode of Operation, 2024–2030 (USD Million)	TABLE 274	Indonesia: Urban Air Mobility Market, By Mode of Operation, 2024–2030 (USD Million)
TABLE 239	Japan: Urban Air Mobility Market, By Mode of Operation, 2031–2035 (USD Million)	TABLE 275	Indonesia: Urban Air Mobility Market, By Mode of Operation, 2031–2035 (USD Million)
TABLE 240	Japan: Urban Air Mobility Market, By Range, 2020–2023 (USD Million)	TABLE 276	Indonesia: Urban Air Mobility Market, By Range, 2020–2023 (USD Million)
TABLE 241	Japan: Urban Air Mobility Market, By Range, 2024–2030 (USD Million)	TABLE 277	Indonesia: Urban Air Mobility Market, By Range, 2024–2030 (USD Million)
TABLE 242	Japan: Urban Air Mobility Market, By Range, 2031–2035 (USD Million)	TABLE 278	Indonesia: Urban Air Mobility Market, By Range, 2031–2035 (USD Million)
TABLE 243	South Korea: Urban Air Mobility Market, By Solution, 2020–2023 (USD Million)	TABLE 279	Latin America: Urban Air Mobility Market, By Country, 2020–2023 (USD Million)
TABLE 244	South Korea: Urban Air Mobility Market, By Solution, 2024–2030 (USD Million)	TABLE 280	Latin America: Urban Air Mobility Market, By Country, 2024–2030 (USD Million)
TABLE 245	South Korea: Urban Air Mobility Market, By Solution, 2031–2035 (USD Million)		
TABLE 246	South Korea: Urban Air Mobility Market, By Mode of Operation, 2020–2023 (USD Million)		
TABLE 247	South Korea: Urban Air Mobility Market, By Mode of Operation, 2024–2030 (USD Million)		
TABLE 248	South Korea: Urban Air Mobility Market, By Mode of Operation, 2031–2035 (USD Million)		
TABLE 249	South Korea: Urban Air Mobility Market, By Range, 2020–2023 (USD Million)		
TABLE 250	South Korea: Urban Air Mobility Market, By Range, 2024–2030 (USD Million)		
TABLE 251	South Korea: Urban Air Mobility Market, By Range, 2031–2035 (USD Million)		
TABLE 252	Australia: Urban Air Mobility Market, By Solution, 2020–2023 (USD Million)		

APPENDIX

LIST OF TABLES

TABLE 281	Latin America: Urban Air Mobility Market, By Country, 2031–2035 (USD Million)	TABLE 313	Mexico: Urban Air Mobility Market, By Range, 2024–2030 (USD Million)
TABLE 282	Latin America: Urban Air Mobility Market, By Solution, 2020–2023 (USD Million)	TABLE 314	Mexico: Urban Air Mobility Market, By Range, 2031–2035 (USD Million)
TABLE 283	Latin America: Urban Air Mobility Market, By Solution, 2024–2030 (USD Million)	TABLE 315	Argentina: Urban Air Mobility Market, By Solution, 2020–2023 (USD Million)
TABLE 284	Latin America: Urban Air Mobility Market, By Solution, 2031–2035 (USD Million)	TABLE 316	Argentina: Urban Air Mobility Market, By Solution, 2024–2030 (USD Million)
TABLE 285	Latin America: Urban Air Mobility Market, By Mobility Type, 2020–2023 (USD Million)	TABLE 317	Argentina: Urban Air Mobility Market, By Solution, 2031–2035 (USD Million)
TABLE 286	Latin America: Urban Air Mobility Market, By Mobility Type, 2024–2030 (USD Million)	TABLE 318	Argentina: Urban Air Mobility Market, By Mode of Operation, 2020–2023 (USD Million)
TABLE 287	Latin America: Urban Air Mobility Market, By Mobility Type, 2031–2035 (USD Million)	TABLE 319	Argentina: Urban Air Mobility Market, By Mode of Operation, 2024–2030 (USD Million)
TABLE 288	Latin America: Urban Air Mobility Market, By Mode of Operation, 2020–2023 (USD Million)	TABLE 320	Argentina: Urban Air Mobility Market, By Mode of Operation, 2031–2035 (USD Million)
TABLE 289	Latin America: Urban Air Mobility Market, By Mode of Operation, 2024–2030 (USD Million)	TABLE 321	Argentina: Urban Air Mobility Market, By Range, 2020–2023 (USD Million)
TABLE 290	Latin America: Urban Air Mobility Market, By Mode of Operation, 2031–2035 (USD Million)	TABLE 322	Argentina: Urban Air Mobility Market, By Range, 2024–2030 (USD Million)
TABLE 291	Latin America: Urban Air Mobility Market, By Range, 2020–2023 (USD Million)	TABLE 323	Argentina: Urban Air Mobility Market, By Range, 2031–2035 (USD Million)
TABLE 292	Latin America: Urban Air Mobility Market, By Range, 2024–2030 (USD Million)	TABLE 324	Costa Rica: Urban Air Mobility Market, By Solution, 2020–2023 (USD Million)
TABLE 293	Latin America: Urban Air Mobility Market, By Range, 2031–2035 (USD Million)	TABLE 325	Costa Rica: Urban Air Mobility Market, By Solution, 2024–2030 (USD Million)
TABLE 294	Latin America: Urban Air Mobility Market, By End User, 2020–2023 (USD Million)	TABLE 326	Costa Rica: Urban Air Mobility Market, By Solution, 2031–2035 (USD Million)
TABLE 295	Latin America: Urban Air Mobility Market, By End User, 2024–2030 (USD Million)	TABLE 327	Costa Rica: Urban Air Mobility Market, By Mode of Operation, 2020–2023 (USD Million)
TABLE 296	Latin America: Urban Air Mobility Market, By End User, 2031–2035 (USD Million)	TABLE 328	Costa Rica: Urban Air Mobility Market, By Mode of Operation, 2024–2030 (USD Million)
TABLE 297	Brazil: Urban Air Mobility Market, By Solution, 2020–2023 (USD Million)	TABLE 329	Costa Rica: Urban Air Mobility Market, By Mode of Operation, 2031–2035 (USD Million)
TABLE 298	Brazil: Urban Air Mobility Market, By Solution, 2024–2030 (USD Million)	TABLE 330	Costa Rica: Urban Air Mobility Market, By Range, 2020–2023 (USD Million)
TABLE 299	Brazil: Urban Air Mobility Market, By Solution, 2031–2035 (USD Million)	TABLE 331	Costa Rica: Urban Air Mobility Market, By Range, 2024–2030 (USD Million)
TABLE 300	Brazil: Urban Air Mobility Market, By Mode of Operation, 2020–2023 (USD Million)	TABLE 332	Costa Rica: Urban Air Mobility Market, By Range, 2031–2035 (USD Million)
TABLE 301	Brazil: Urban Air Mobility Market, By Mode of Operation, 2024–2030 (USD Million)	TABLE 333	Rest of the World: Urban Air Mobility Market, By Region, 2020–2023 (USD Million)
TABLE 302	Brazil: Urban Air Mobility Market, By Mode of Operation, 2031–2035 (USD Million)	TABLE 334	Rest of the World: Urban Air Mobility Market, By Region, 2024–2030 (USD Million)
TABLE 303	Brazil: Urban Air Mobility Market, By Range, 2020–2023 (USD Million)	TABLE 335	Rest of the World: Urban Air Mobility Market, By Region, 2031–2035 (USD Million)
TABLE 304	Brazil: Urban Air Mobility Market, By Range, 2024–2030 (USD Million)	TABLE 336	Rest of the World: Urban Air Mobility Market, By Solution, 2020–2023 (USD Million)
TABLE 305	Brazil: Urban Air Mobility Market, By Range, 2031–2035 (USD Million)	TABLE 337	Rest of the World: Urban Air Mobility Market, By Solution, 2024–2030 (USD Million)
TABLE 306	Mexico: Urban Air Mobility Market, By Solution, 2020–2023 (USD Million)	TABLE 338	Rest of the World: Urban Air Mobility Market, By Solution, 2031–2035 (USD Million)
TABLE 307	Mexico: Urban Air Mobility Market, By Solution, 2024–2030 (USD Million)	TABLE 339	Rest of the World: Urban Air Mobility Market, By Mobility Type, 2020–2023 (USD Million)
TABLE 308	Mexico: Urban Air Mobility Market, By Solution, 2031–2035 (USD Million)	TABLE 340	Rest of the World: Urban Air Mobility Market, By Mobility Type, 2024–2030 (USD Million)
TABLE 309	Mexico: Urban Air Mobility Market, By Mode of Operation, 2020–2023 (USD Million)	TABLE 341	Rest of the World: Urban Air Mobility Market, By Mobility Type, 2031–2035 (USD Million)
TABLE 310	Mexico: Urban Air Mobility Market, By Mode of Operation, 2024–2030 (USD Million)		
TABLE 311	Mexico: Urban Air Mobility Market, By Mode of Operation, 2031–2035 (USD Million)		
TABLE 312	Mexico: Urban Air Mobility Market, By Range, 2020–2023 (USD Million)		

APPENDIX

LIST OF TABLES

TABLE 342	Rest of the World: Urban Air Mobility Market, By Mode of Operation, 2020–2023 (USD Million)	TABLE 373	Turkey: Urban Air Mobility Market, By Solution, 2024–2030 (USD Million)
TABLE 343	Rest of the World: Urban Air Mobility Market, By Mode of Operation, 2024–2030 (USD Million)	TABLE 374	Turkey: Urban Air Mobility Market, By Solution, 2031–2035 (USD Million)
TABLE 344	Rest of the World: Urban Air Mobility Market, By Mode of Operation, 2031–2035 (USD Million)	TABLE 375	Turkey: Urban Air Mobility Market, By Mode of Operation, 2020–2023 (USD Million)
TABLE 345	Rest of the World: Urban Air Mobility Market, By Range, 2020–2023 (USD Million)	TABLE 376	Turkey: Urban Air Mobility Market, By Mode of Operation, 2024–2030 (USD Million)
TABLE 346	Rest of the World: Urban Air Mobility Market, By Range, 2024–2030 (USD Million)	TABLE 377	Turkey: Urban Air Mobility Market, By Mode of Operation, 2031–2035 (USD Million)
TABLE 347	Rest of the World: Urban Air Mobility Market, By Range, 2031–2035 (USD Million)	TABLE 378	Turkey: Urban Air Mobility Market, By Range, 2020–2023 (USD Million)
TABLE 348	Rest of the World: Urban Air Mobility Market, By End User, 2020–2023 (USD Million)	TABLE 379	Turkey: Urban Air Mobility Market, By Range, 2024–2030 (USD Million)
TABLE 349	Rest of the World: Urban Air Mobility Market, By End User, 2024–2030 (USD Million)	TABLE 380	Turkey: Urban Air Mobility Market, By Range, 2031–2035 (USD Million)
TABLE 350	Rest of the World: Urban Air Mobility Market, By End User, 2031–2035 (USD Million)	TABLE 381	Africa: Urban Air Mobility Market, By Solution, 2020–2023 (USD Million)
TABLE 351	Middle East: Urban Air Mobility Market, By Country, 2020–2023 (USD Million)	TABLE 382	Africa: Urban Air Mobility Market, By Solution, 2024–2030 (USD Million)
TABLE 352	Middle East: Urban Air Mobility Market, By Country, 2024–2030 (USD Million)	TABLE 383	Africa: Urban Air Mobility Market, By Solution, 2031–2035 (USD Million)
TABLE 353	Middle East: Urban Air Mobility Market, By Country, 2031–2035 (USD Million)	TABLE 384	Africa: Urban Air Mobility Market, By Mode of Operation, 2020–2023 (USD Million)
TABLE 354	Saudi Arabia: Urban Air Mobility Market, By Solution, 2020–2023 (USD Million)	TABLE 385	Africa: Urban Air Mobility Market, By Mode of Operation, 2024–2030 (USD Million)
TABLE 355	Saudi Arabia: Urban Air Mobility Market, By Solution, 2024–2030 (USD Million)	TABLE 386	Africa: Urban Air Mobility Market, By Mode of Operation, 2031–2035 (USD Million)
TABLE 356	Saudi Arabia: Urban Air Mobility Market, By Solution, 2031–2035 (USD Million)	TABLE 387	Africa: Urban Air Mobility Market, By Range, 2020–2023 (USD Million)
TABLE 357	Saudi Arabia: Urban Air Mobility Market, By Mode of Operation, 2020–2023 (USD Million)	TABLE 388	Africa: Urban Air Mobility Market, By Range, 2024–2030 (USD Million)
TABLE 358	Saudi Arabia: Urban Air Mobility Market, By Mode of Operation, 2024–2030 (USD Million)	TABLE 389	Africa: Urban Air Mobility Market, By Range, 2031–2035 (USD Million)
TABLE 359	Saudi Arabia: Urban Air Mobility Market, By Mode of Operation, 2031–2035 (USD Million)	TABLE 390	Key Strategies Adopted By Key Players, 2023
TABLE 360	Saudi Arabia: Urban Air Mobility Market, By Range, 2020–2023 (USD Million)	TABLE 391	Urban Air Mobility Market: Degree of Competition
TABLE 361	Saudi Arabia: Urban Air Mobility Market, By Range, 2024–2030 (USD Million)	TABLE 392	Urban Air Mobility Market: Company Solution Footprint
TABLE 362	Saudi Arabia: Urban Air Mobility Market, By Range, 2031–2035 (USD Million)	TABLE 393	Urban Air Mobility Market: Company Range Footprint
TABLE 363	UAE: Urban Air Mobility Market, By Solution, 2020–2023 (USD Million)	TABLE 394	Urban Air Mobility Market: Company Mode of Operation Footprint
TABLE 364	UAE: Urban Air Mobility Market, By Solution, 2024–2030 (USD Million)	TABLE 395	Urban Air Mobility Market: Company Region Footprint
TABLE 365	UAE: Urban Air Mobility Market, By Solution, 2031–2035 (USD Million)	TABLE 396	Urban Air Mobility Market: List of Startups/SMEs
TABLE 366	UAE: Urban Air Mobility Market, By Mode of Operation, 2020–2023 (USD Million)	TABLE 397	Urban Air Mobility Market: Competitive Benchmarking of Key Startups/SMEs
TABLE 367	UAE: Urban Air Mobility Market, By Mode of Operation, 2024–2030 (USD Million)	TABLE 398	Urban Air Mobility Market: Product Launches and Developments, January 2021–July 2024
TABLE 368	UAE: Urban Air Mobility Market, By Mode of Operation, 2031–2035 (USD Million)	TABLE 399	Urban Air Mobility Market: Deals, January 2021–July 2024
TABLE 369	UAE: Urban Air Mobility Market, By Range, 2020–2023 (USD Million)	TABLE 400	Urban Air Mobility Market: Other Developments, January 2021–July 2024
TABLE 370	UAE: Urban Air Mobility Market, By Range, 2024–2030 (USD Million)	TABLE 401	AIRBUS: Company Overview
TABLE 371	UAE: Urban Air Mobility Market, By Range, 2031–2035 (USD Million)	TABLE 402	AIRBUS: Products/Solutions/Services Offered
TABLE 372	Turkey: Urban Air Mobility Market, By Solution, 2020–2023 (USD Million)	TABLE 403	AIRBUS: Product Launches
		TABLE 404	AIRBUS: Deals
		TABLE 405	EVE HOLDING, INC.: Company Overview
		TABLE 406	EVE HOLDING, INC.: Products/Solutions/Services Offered
		TABLE 407	EVE HOLDING, INC.: Deals
		TABLE 408	VERTICAL AEROSPACE: Company Overview
		TABLE 409	VERTICAL AEROSPACE: Products/Solutions/Services Offered
		TABLE 410	VERTICAL AEROSPACE: Deals
		TABLE 411	VERTICAL AEROSPACE: Other Developments
		TABLE 412	EHANG: Company Overview
		TABLE 413	EHANG: Products/Solutions/Services Offered
		TABLE 414	EHANG: Deals
		TABLE 415	EHANG: Others
		TABLE 416	ARCHER AVIATION INC.: Company Overview

APPENDIX

LIST OF TABLES

TABLE 417	ARCHER AVIATION INC.: Products/Solutions/Services Offered	TABLE 444	LILIJUM GMBH: Products/Solutions/Services Offered
TABLE 418	ARCHER AVIATION INC.: Deals	TABLE 445	LILIJUM GMBH: Deals
TABLE 419	ARCHER AVIATION INC.: Other Developments	TABLE 446	LILIJUM GMBH: Other Developments
TABLE 420	TEXTRON INC.: Company Overview	TABLE 447	WINGCOPTER: Company Overview
TABLE 421	TEXTRON INC.: Products/Solutions/Services Offered	TABLE 448	WINGCOPTER: Products/Solutions/Services Offered
TABLE 422	TEXTRON INC.: Deals	TABLE 449	WINGCOPTER: Deals
TABLE 423	TEXTRON INC.: Other Developments	TABLE 450	WINGCOPTER: Other Developments
TABLE 424	JOBY AVIATION: Company Overview	TABLE 451	BETA TECHNOLOGIES: Company Overview
TABLE 425	JOBY AVIATION: Services/Solutions Offered	TABLE 452	BETA TECHNOLOGIES: Products/Solutions/Services Offered
TABLE 426	JOBY AVIATION: Deals	TABLE 453	BETA TECHNOLOGIES: Deals
TABLE 427	JOBY AVIATION: Other Developments	TABLE 454	BETA TECHNOLOGIES: Other Developments
TABLE 428	FERROVIAL: Company Overview	TABLE 455	VOLOCOPTER GMBH: Company Overview
TABLE 429	FERROVIAL: Products/Solutions/Services Offered	TABLE 456	VOLOCOPTER GMBH: Products/Solutions/Services Offered
TABLE 430	FERROVIAL: Deals	TABLE 457	VOLOCOPTER GMBH: Deals
TABLE 431	FERROVIAL: Other Developments	TABLE 458	VOLOCOPTER GMBH: Other Developments
TABLE 432	SKYPORTS INFRASTRUCTURE LIMITED: Company Overview	TABLE 459	ARC AERO SYSTEMS: Company Overview
TABLE 433	SKYPORTS INFRASTRUCTURE LIMITED: Products/Solutions/Services Offered	TABLE 460	SKYDRIVE INC.: Company Overview
TABLE 434	SKYPORTS INFRASTRUCTURE LIMITED: Deals	TABLE 461	ELECTRA.AERO: Company Overview
TABLE 435	SKYPORTS INFRASTRUCTURE LIMITED: Others	TABLE 462	AUTOFLIGHT: Company Overview
TABLE 436	WISK AERO LLC: Company Overview	TABLE 463	OVERAIR, INC.: Company Overview
TABLE 437	WISK AERO LLC: Products/Solutions/Services Offered	TABLE 464	MANTA AIRCRAFT: Company Overview
TABLE 438	WISK AERO LLC: Deals	TABLE 465	AIR VEV LTD: Company Overview
TABLE 439	WISK AERO LLC: Other Developments	TABLE 466	URBAN AERONAUTICS LTD.: Company Overview
TABLE 440	JAUNT AIR MOBILITY LLC.: Company Overview	TABLE 467	SKYRYSE, INC.: Company Overview
TABLE 441	JAUNT AIR MOBILITY LLC.: Products/Solutions/Services Offered	TABLE 468	ASCENDANCE FLIGHT TECHNOLOGIES S.A.S.: Company Overview
TABLE 442	JAUNT AIR MOBILITY LLC.: Deals		
TABLE 443	LILIJUM GMBH: Company Overview		

APPENDIX

LIST OF FIGURES

FIGURE 1	Urban Air Mobility Market Segmentation	FIGURE 39	Faa Urban Traffic Management Development and Implementation
FIGURE 2	Research Process Flow	FIGURE 40	Indicative Pricing Analysis for Urban Air Mobility Platform, By Key Players (USD Million)
FIGURE 3	Research Design	FIGURE 41	Pricing Analysis: Comparative Study between Range (Km) and Price (USD Million)
FIGURE 4	Breakdown of Primary Interviews	FIGURE 42	Pricing Analysis: Comparative Study between Price and Mton
FIGURE 5	Bottom-up Approach	FIGURE 43	Pricing Analysis: Comparative Study between Price and Passenger Capacity
FIGURE 6	Top-Down Approach	FIGURE 44	Urban Air Mobility Market: Technology Roadmap
FIGURE 7	Data Triangulation	FIGURE 45	Urban Air Mobility Market: Evolution of Key Technologies
FIGURE 8	Intercity (>100 Km) Segment to Hold Leading Market Share in 2024	FIGURE 46	AI/Generative AI Landscape
FIGURE 9	Air Taxis to Surpass Other Segments During Forecast Period	FIGURE 47	AI/Generative AI Adoption in Top Countries for Commercial Aviation
FIGURE 10	Platform to Hold Larger Market Share Than Infrastructure between 2024 and 2035	FIGURE 48	Scenario Analysis for Evtol Platforms for Urban Air Mobility
FIGURE 11	North America to Register Highest CAGR During Forecast Period	FIGURE 49	List of Major Patents Related to Urban Air Mobility Market
FIGURE 12	Need for Alternative Modes of Transportation in Urban Areas to Drive Market	FIGURE 50	Urban Air Mobility Market, By Solution, 2024–2035 (USD Million)
FIGURE 13	Ridesharing Companies to Secure Maximum Market Share During Forecast Period	FIGURE 51	Urban Air Mobility Market, By Platform Architecture, 2024–2035 (USD Million)
FIGURE 14	Piloted Segment to Record Larger Market Share Than Autonomous Segment By 2035	FIGURE 52	Urban Air Mobility Market, By Mobility Type, 2024–2035 (USD Million)
FIGURE 15	UK to Be Fastest-Growing Country-Level Market During Forecast Period	FIGURE 53	Urban Air Mobility Market, By End User, 2024–2035 (USD Million)
FIGURE 16	Urban Air Mobility Market: Drivers, Restraints, Opportunities, and Challenges	FIGURE 54	Urban Air Mobility Market, By Mode of Operation, 2024–2035 (USD Million)
FIGURE 17	Value Chain Analysis	FIGURE 55	Urban Air Mobility Market, By Range, 2024–2035 (USD Million)
FIGURE 18	Urban Air Mobility Market Ecosystem	FIGURE 56	North America to Account for Largest Share of Urban Air Mobility Market in 2024
FIGURE 19	Trends and Disruptions Impacting Customer Business	FIGURE 57	North America: Urban Air Mobility Market Snapshot
FIGURE 20	Top 10 Importing Countries, 2019–2023 (USD Thousand)	FIGURE 58	Europe: Urban Air Mobility Market Snapshot
FIGURE 21	Top 10 Exporting Countries, 2019–2023 (USD Thousand)	FIGURE 59	Asia Pacific: Urban Air Mobility Market Snapshot
FIGURE 22	Certification Process for Urban Air Mobility Vehicles	FIGURE 60	Latin America: Urban Air Mobility Market Snapshot
FIGURE 23	Influence of Stakeholders on Buying Process, By Solution	FIGURE 61	Rest of the World: Urban Air Mobility Market Snapshot
FIGURE 24	Key Buying Criteria for Urban Air Mobility, By Solution	FIGURE 62	Revenue Analysis of Top 5 Players, 2021–2023
FIGURE 25	Macroeconomic Outlook for North America, Europe, Asia Pacific, and Middle East	FIGURE 63	Market Share Analysis, 2023
FIGURE 26	Macroeconomic Outlook for Latin America and Africa	FIGURE 64	Urban Air Mobility Market: Company Evaluation Matrix (Key Players) By Platform, 2023
FIGURE 27	Bill of Materials, By Platform	FIGURE 65	Urban Air Mobility Market: Company Evaluation Matrix (Key Players), By Infrastructure, 2023
FIGURE 28	Bill of Materials, By Urban Air Mobility Infrastructure	FIGURE 66	Urban Air Mobility Market: Company Footprint
FIGURE 29	Total Cost of Ownership for Urban Air Mobility Platform throughout Life Cycle	FIGURE 67	Urban Air Mobility Market: Company Evaluation Matrix (Startups/SMEs), By Solution, 2023
FIGURE 30	Total Cost of Ownership for Urban Air Mobility Infrastructure throughout Life Cycle	FIGURE 68	Company Valuation of Key Players, 2023
FIGURE 31	Business Models for Urban Air Mobility Platform Operations	FIGURE 69	Ev/Ebitda of Key Players, 2023
FIGURE 32	Business Models for Urban Air Mobility Infrastructure Operations	FIGURE 70	AIRBUS: Company Snapshot
FIGURE 33	Investment and Funding Scenario, 2020–2024	FIGURE 71	WISK AERO LLC: Company Snapshot
FIGURE 34	Development Potential of Urban Air Mobility from 2010 Onwards		
FIGURE 35	Key Urban Air Mobility Platform Noise Levels		
FIGURE 36	Key Urban Air Mobility Platform Technology Readiness Level		
FIGURE 37	Key Urban Air Mobility Platform System Supplier Landscape		
FIGURE 38	Urban Traffic Management Development By Nasa		

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