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URBAN AIR MOBILITY MARKET

GLOBAL FORECAST TO 2035

REPORT BROCHURE WITH SAMPLE PAGES

REPORT CODE: AS 6957

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

URBAN AIR MOBILITY MARKET

MARKET SEGMENTATION & GEOGRAPHICAL SPREAD

SOLUTION

- Platform
  - Aerostructures
  - Avionics
    - Flight Control Systems
    - Navigation Systems
    - Communications Systems
    - Sensors
      - Speed Sensors
      - Light Sensors
      - Proximity Sensors
      - Position Sensors
      - Temperature Sensors
  - Propulsion Systems
    - Electric Batteries
    - Solar Cells
    - Fuel Cells
    - Fuel-powered
    - Hybrid Electric
  - Electrical Systems
    - Generators
    - Motors
    - Electric Actuators
    - Electric Pumps
    - Distribution Devices
  - Software
- Infrastructure
  - Charging Stations
  - Vertiports
  - Air Traffic Management Facilities
  - Maintenance Facilities

PLATFORM ARCHITECTURE

- Rotary-wing
  - Helicopters
  - Multicopters
- Fixed-wing Hybrid
  - Lift + Cruise
  - Vector Thrust
- Fixed-wing

MOBILITY TYPE

- Air Taxis
  - Manned Air Taxis
  - Drone Taxis
- Air Shuttles & Air Metro
- Personal Air Vehicles
- Cargo Air Vehicles
  - First-mile Delivery
  - Middle-mile Delivery
  - Last-mile Delivery
- Air Ambulances & Medical Emergency Vehicles

MODE OF OPERATION

- Piloted
- Autonomous
  - Remotely Piloted
  - Fully Autonomous

RANGE

- Intercity (>100 km)
- Intracity (<100 km)

END USER

- Ridesharing Companies
- Scheduled Operators
- E-commerce Companies
- Hospitals & Medical Agencies
- Private Operators

REGIONAL SNAPSHOT

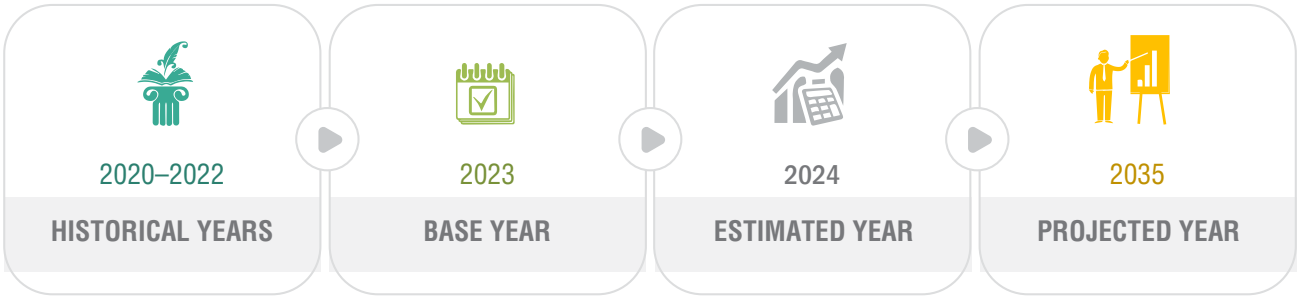
NORTH AMERICA	EUROPE	ASIA PACIFIC	LATIN AMERICA	REST OF THE WORLD
▪ US	▪ UK	▪ China	▪ Brazil	▪ Middle East
▪ Canada	▪ Germany	▪ Japan	▪ Mexico	• Saudi Arabia
	▪ France	▪ India	▪ Argentina	• UAE
	▪ Italy	▪ Australia	▪ Costa Rica	• Turkey
	▪ Switzerland	▪ South Korea		▪ Africa
	▪ Spain	▪ Singapore		
	▪ Ireland	▪ Indonesia		
	▪ Belgium			

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.

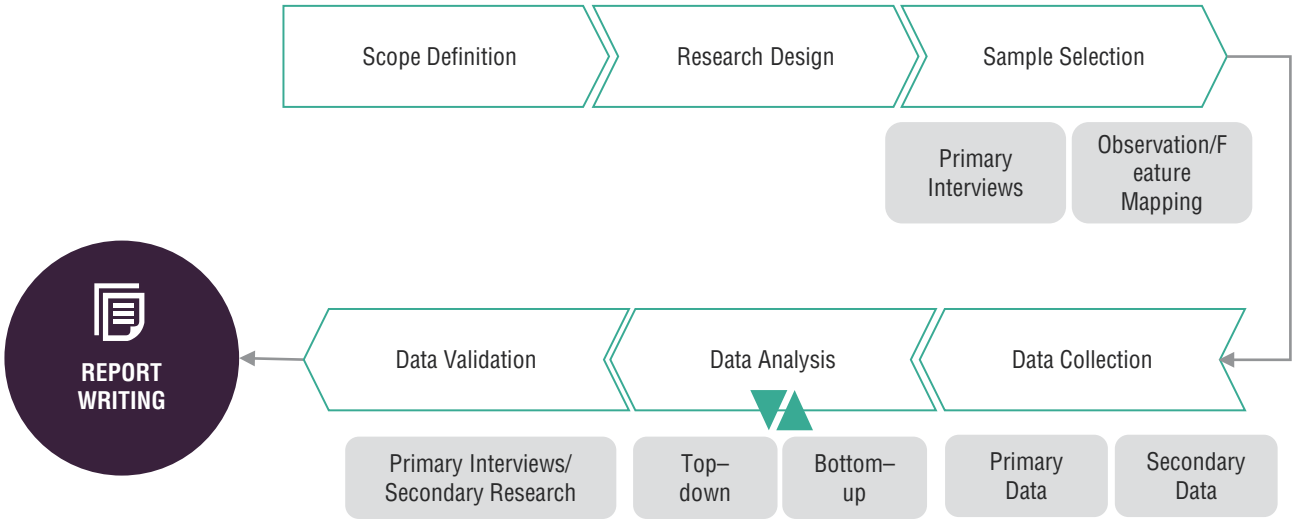
RESEARCH METHODOLOGY

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.

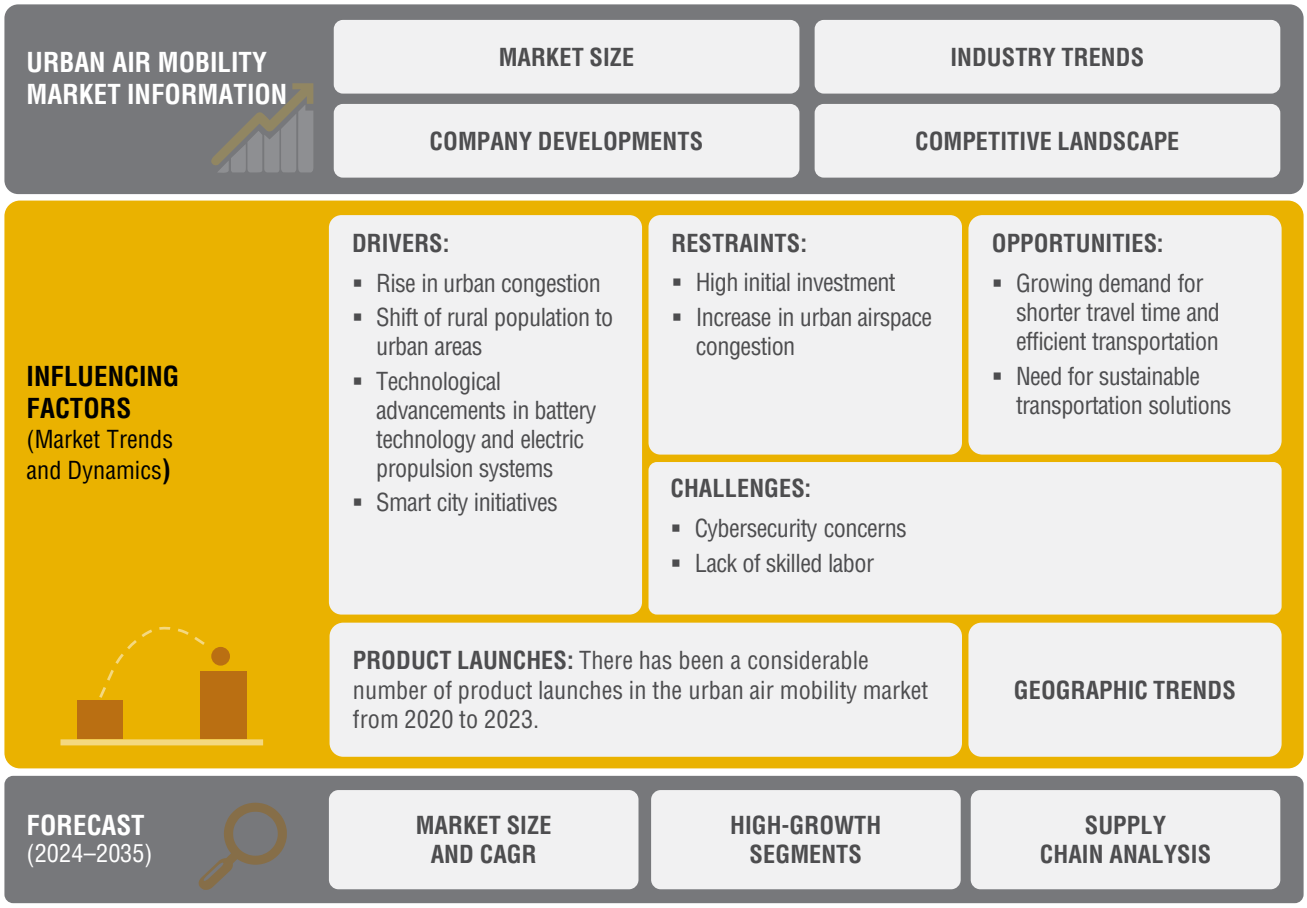
The following figure showcases the research methodology applied in developing this report on the UAM market.

FIGURE 2 RESEARCH PROCESS FLOW



RESEARCH METHODOLOGY

FIGURE 3 RESEARCH DESIGN



Source: Secondary Research and MarketsandMarkets Analysis

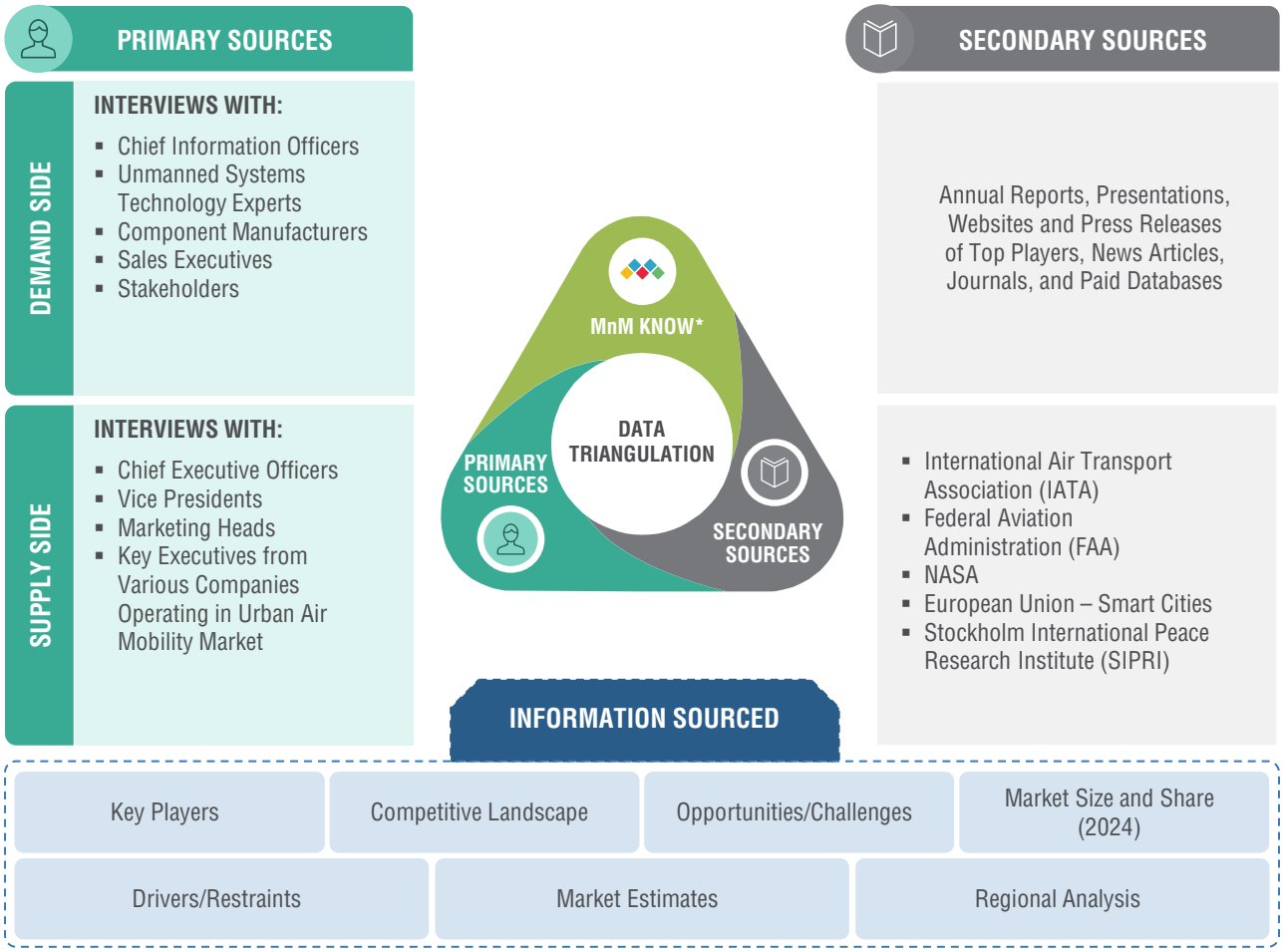
RESEARCH METHODOLOGY

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.

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1 EXECUTIVE SUMMARY

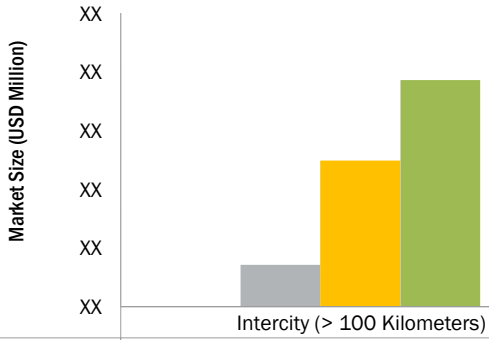
Urban air mobility (UAM) is revolutionizing transportation within cities using advanced aerial technologies. UAM reduces traffic congestion and travel time and enhances overall mobility by utilizing the vertical dimension of cities. Moreover, eVTOL aircraft, powered by electric propulsion systems, offer 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

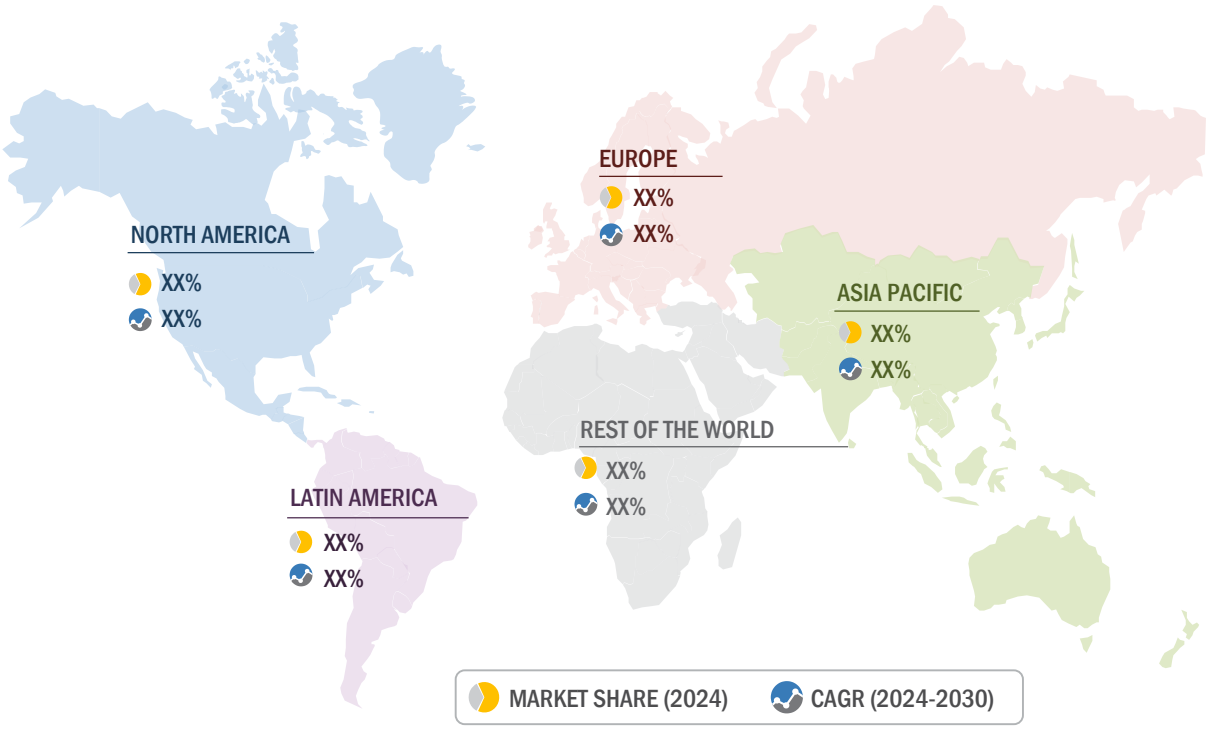


	Intercity (> 100 Kilometers)	Intracity (< 100 Kilometers)
2024	XX	XX
2030	XX	XX
2035	XX	XX
CAGR (2024–2030)	XX%	XX%
CAGR (2031–2035)	X%	XX%

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

North America is projected to be the fastest-growing regional market during the forecast period. This growth can be attributed to its supportive regulatory environment and robust infrastructure.

4.6 USD BILLION 2024

41.5 USD BILLION 2035

CAGR of 12.1%

The urban air mobility market is projected to reach USD 41.5 billion by 2035, registering a CAGR of 12.1% (2031-2035).

Market growth can be attributed to the increasing need for alternative modes of transportation, green energy, and noise-free aircraft.

Product launches and contracts are expected to offer lucrative opportunities to market players in the next five years.

By solution, the infrastructure segment of the urban air mobility market is projected to reach USD 12.1 billion by 2035, registering a CAGR of 14.4% (2031-2035).

The market growth in Europe can be attributed to significant investments in R&D activities to reduce carbon footprint and the technological advancements in urban air mobility platforms.

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	XX	XX	XX	XX	XX	XX	XX
Avionics	XX	XX	XX	XX	XX	XX	XX	XX
Propulsion Systems	XX	XX	XX	XX	XX	XX	XX	XX
Electrical Systems	XX	XX	XX	XX	XX	XX	XX	XX
Software	XX	XX	XX	XX	XX	XX	XX	XX
Total	**XX**	**XX**	**XX**	**XX**	**XX**	**XX**	**XX**	**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

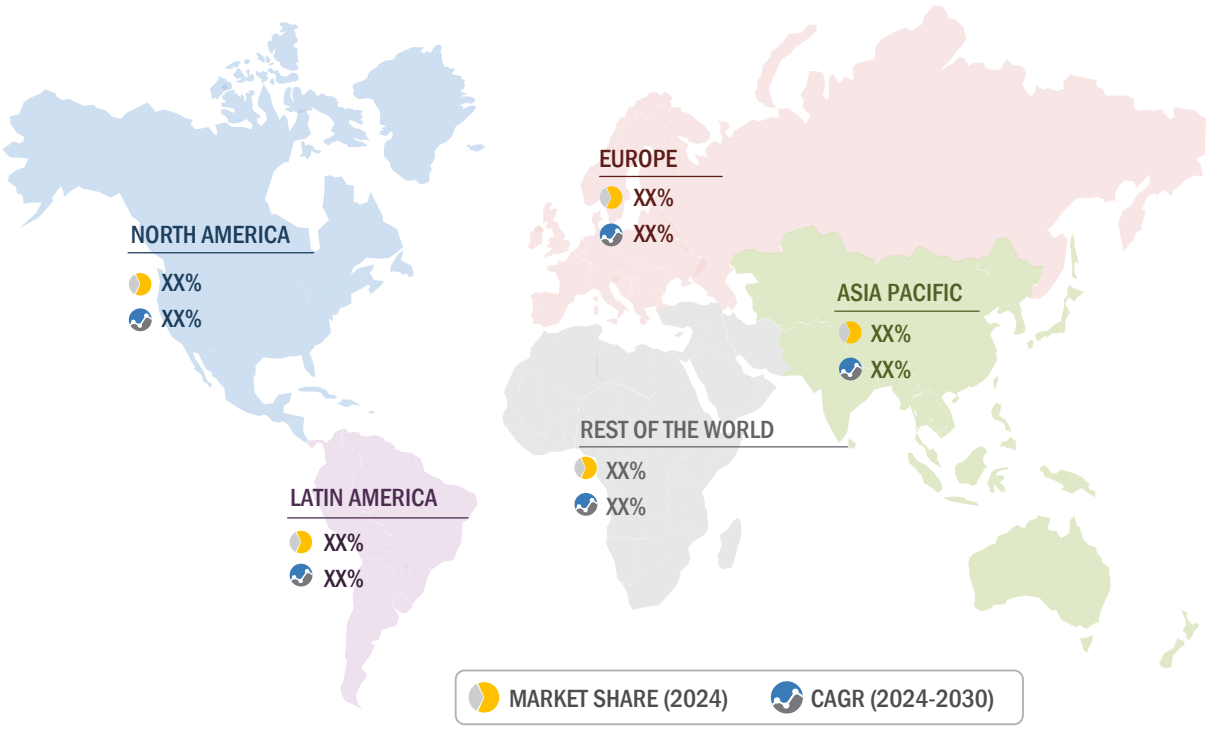
5 URBAN AIR MOBILITY MARKET, BY REGION

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	XX	XX	XX	XX	XX	XX	XX
Europe	XX	XX	XX	XX	XX	XX	XX	XX
Asia Pacific	XX	XX	XX	XX	XX	XX	XX	XX
Latin America	XX	XX	XX	XX	XX	XX	XX	XX
Rest of the World	XX	XX	XX	XX	XX	XX	XX	XX
Total	**XX**	**XX**	**XX**	**XX**	**XX**	**XX**	**XX**	**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**

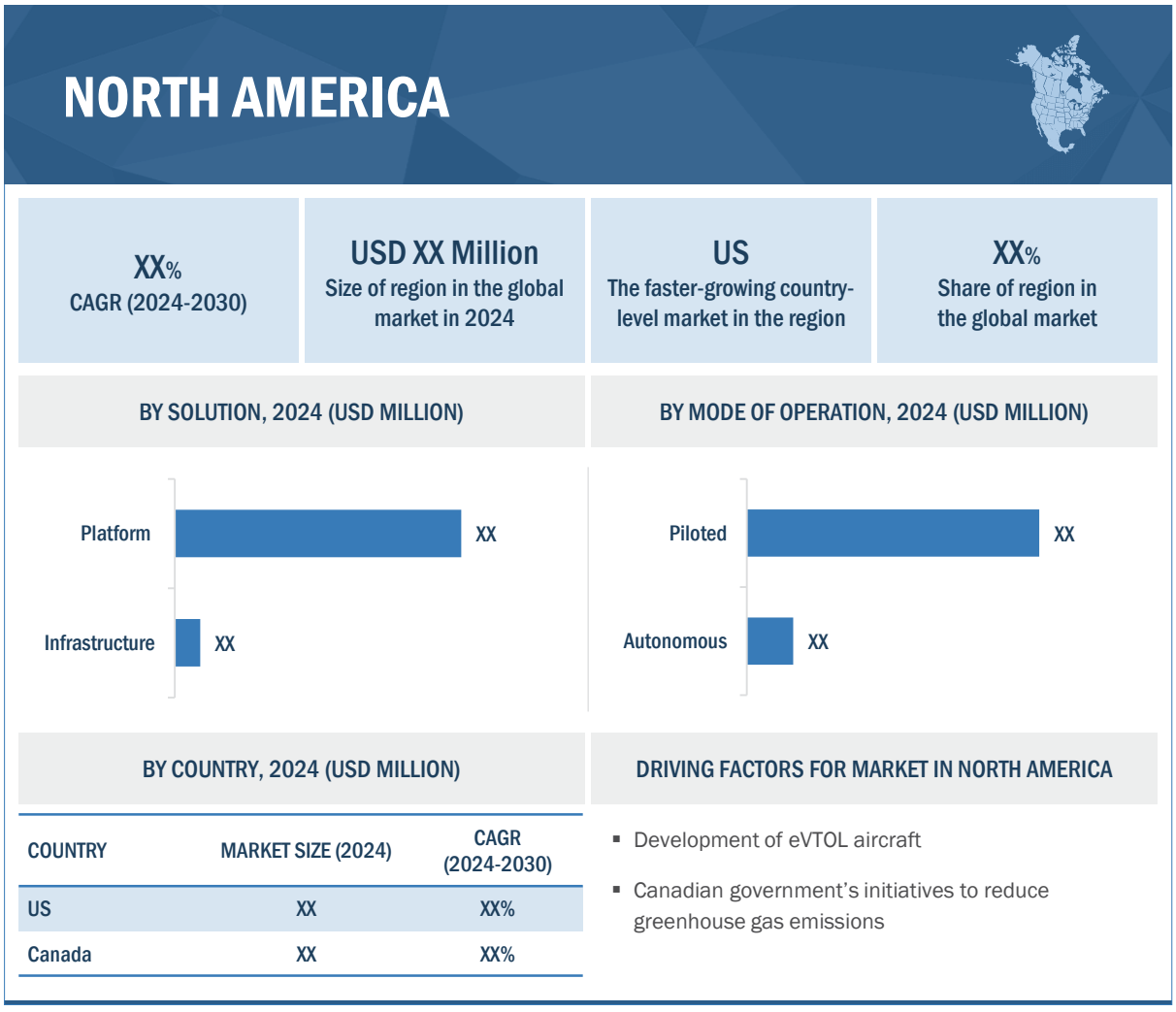
Source: Secondary Research, Interviews with Experts, and MarketsandMarkets Analysis

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	XX	XX	XX	XX	XX	XX	XX
Canada	XX	XX	XX	XX	XX	XX	XX	XX
Total	**XX**	**XX**	**XX**	**XX**	**XX**	**XX**	**XX**	**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	XX	XX	XX	XX	XX	XX	XX
Platform	XX	XX	XX	XX	XX	XX	XX	XX
Total	**XX**	**XX**	**XX**	**XX**	**XX**	**XX**	**XX**	**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

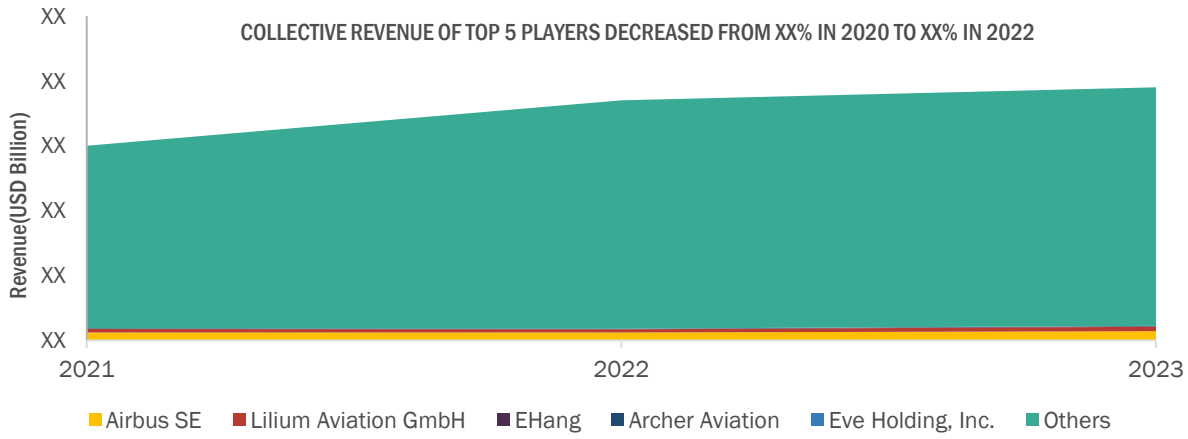
6.1 INTRODUCTION

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

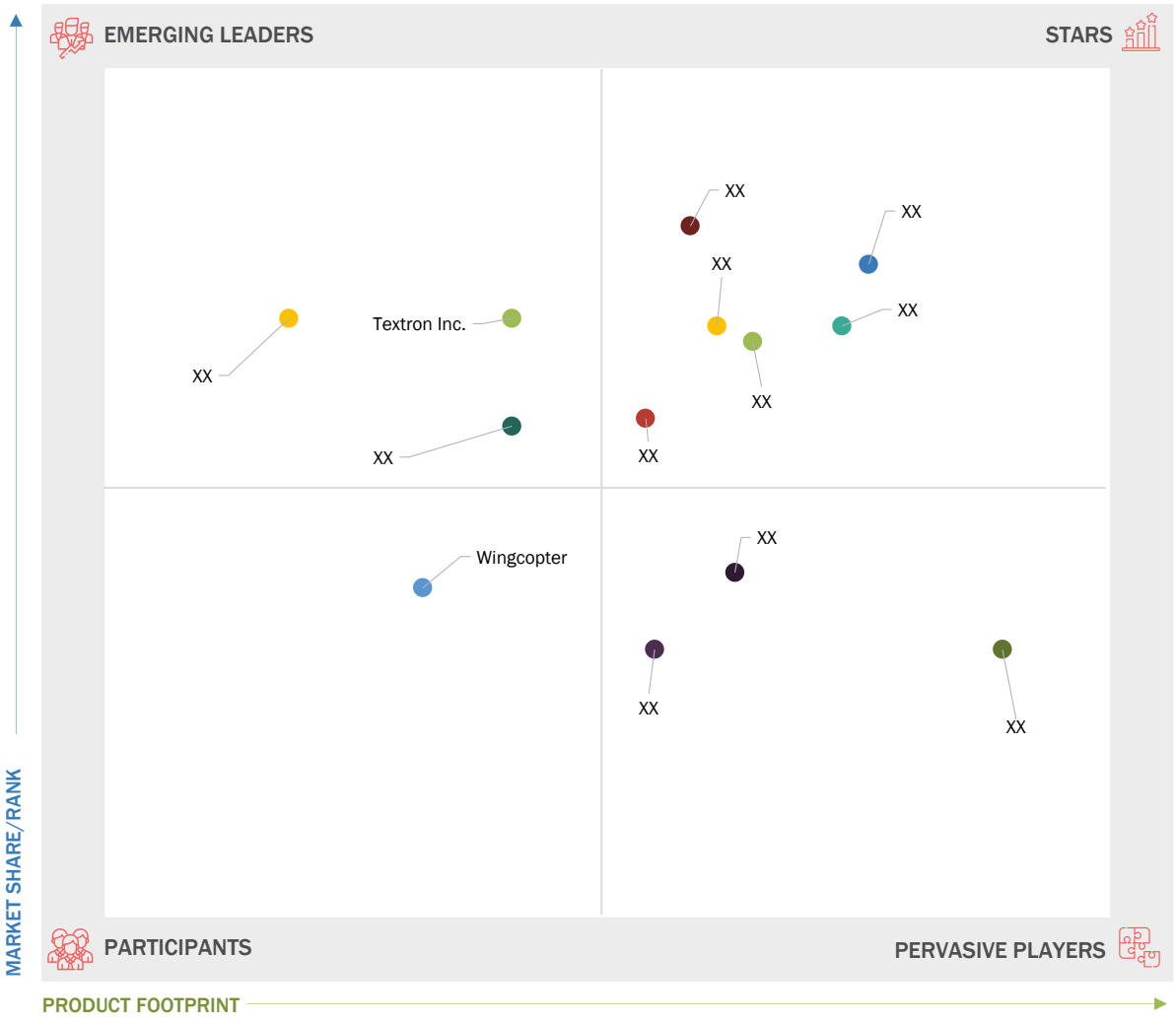


Note: The top 5 players have been analyzed based on the order book they received until 2023. Once the market is commercialized, these players are expected to account for the largest market share.

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.

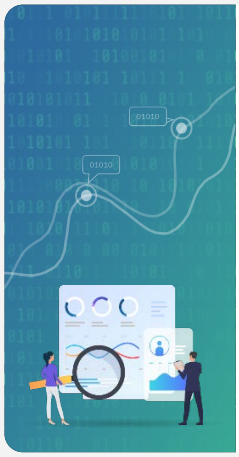
The Airbus Defense and Space business segment is actively involved in the development of UAM solutions. Establishing a comprehensive UAM ecosystem involves the development of necessary infrastructure components. This includes the creation of vertiports or sky ports, which serve as dedicated hubs for 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.

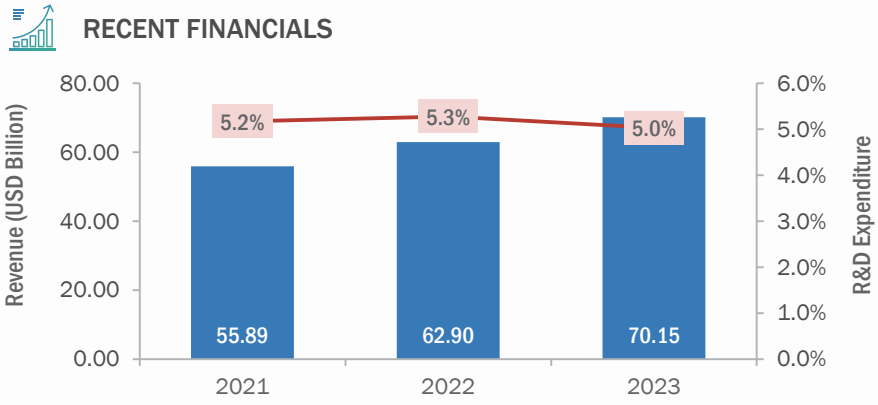
TABLE 14 AIRBUS: COMPANY OVERVIEW

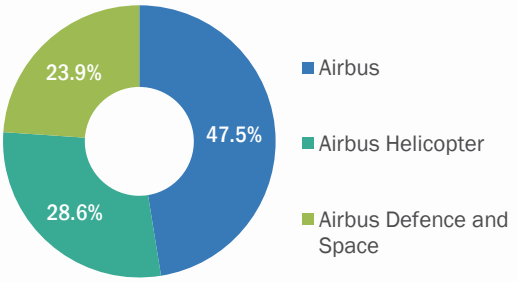
Founding Year	1970
Country	Netherlands
City	Leiden
Employees	147,900
Ownership Type	Public (EPA: AIR)

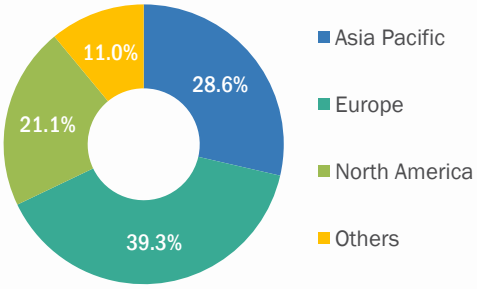
Source: Company Website

FIGURE 9 AIRBUS: COMPANY SNAPSHOT









Source: Company Website and Annual Reports

APPENDIX

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MARKETSANDMARKETS™

RELATED REPORTS

COMMERCIAL ELECTRIC AIRCRAFT MARKET

GLOBAL FORECAST TO 2035

February 2024

EVTOL AIRCRAFT MARKET

GLOBAL FORECAST TO 2030

July 2023

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MarketsandMarkets™ is the world's largest revenue impact company, serving over 7500 customers. 80% of top 2000 companies globally rely on us for identifying new high growth and niche revenue opportunities.

In the face of constant technology innovation and market disruption, we help organizations plan and operationalize their future revenue mix decisions by identifying over 30,000 high growth opportunities ranging from $1B to $500B across 90+ industry trends and markets. Organizations choose MarketsandMarkets™ to stay ahead of the curve and accelerate their revenue decisions and implementations by 6 – 12 months, giving them a unique, first-mover advantage.

Our revenue impact methodology provides quantified and actionable insights on converged, granular and connected market eco-systems that result from disruptive technologies and high-growth markets. We provide an extended lens on not only what will impact our client's revenue but also what will impact their clients' revenues, continually uncovering latent opportunities.

We work across all major B2B industries with C-level executives in functions such as Strategy, Marketing, Sales, R&D, Product, and M&A. MarketsandMarkets™ brings exclusive high-growth markets intelligence generated by over 850 SMEs and analysts along with its proprietary Revenue Impact platform (Knowledge Store).