Fighter Aircraft Market Size & Share Analysis - Growth Trends and Forecast (2026 - 2031)

> **Industry:** Military Aircraft & Defense Electronics (Aerospace & Defense)
> **Source:** https://www.mordorintelligence.com/industry-reports/fighter-aircraft-market
> **Scraped Date:** 2026-09-17

Executive Market Summary

Market Metric	Details
Base Market Size	USD 52.82 billion
Projected Forecast (2031)	USD 52.82 billion
Growth Rate (CAGR)	4.19 %
Largest Market Region	N/A
Fastest-Growing Region	N/A

Market Visualizations & Infographics

`![Major players in Fighter Aircraft industry](images/chart_2.png)`

`![Fighter Aircraft Market (2025 - 2030)](images/chart_3.png)`

`![Fighter Aircraft Market: Market Share by Take-off and Landing, 2025](images/chart_4.png)`

`![Fighter Aircraft Market: Market Share by Mission Role, 2025](images/chart_5.png)`

`![Fighter Aircraft Market CAGR (%), Growth Rate by Region](images/chart_6.png)`

`![Fighter Aircraft Market Concentration](images/chart_7.png)`

`![Icon](images/chart_8.png)`

`![footer background image](images/chart_10.png)`

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`![ESOMAR](images/chart_17.png)`

`![GPTW](images/chart_19.png)`

Comprehensive Research Analysis

Overview Points List Flex 49 Share Feature End

Market OverviewStudy Period | 2020 - 2031 |
Market Size (2026) | USD 52.82 Billion |
Market Size (2031) | USD 64.84 Billion |
Growth Rate (2026 - 2031) | 4.19 % |
Fastest Growing Market | Europe |
Largest Market | North America |
Market Concentration | Medium |
Major Players*Disclaimer: Major Players sorted in no particular order

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Market Overview

Fighter Aircraft Market Analysis by Mordor IntelligenceThe fighter aircraft market size was valued at USD 50.70 billion in 2025 and estimated to grow from USD 52.82 billion in 2026 to reach USD 64.84 billion by 2031, at a CAGR of 4.19% during the forecast period (2026-2031). Surging defense budgets in the Indo-Pacific, accelerated fleet recapitalization across NATO, and the emergence of 6th-generation air-dominance concepts are steering steady expansion, although program delays and rising pilot-training costs temper momentum. Sustained procurement appetite is visible in the shift from 4.5th-generation toward manned-unmanned teaming, the growing influence of naval aviation requirements, and intensified investment in indigenous design programs that promise strategic sovereignty for host nations. Competitive dynamics are transitioning from platform-centric to software-defined offerings, rewarding suppliers that master digital-twin workflows, open architectures, and AI-enabled autonomy. Meanwhile, environmental regulations on engine emissions, looming talent shortages, and ITAR compliance hurdles continue to pose structural challenges for OEMs and operators alike.

Key Report Takeaways* By take-off and landing, CTOL platforms commanded 57.96% of the fighter aircraft market share in 2025, while VTOL/STOVL platforms are projected to expand at a 6.27% CAGR through 2031.
* By end user, naval aviation is advancing at a 7.72% CAGR to 2031, outpacing the Air Force segment, which held a 52.41% share of the fighter aircraft market in 2025.
* By fighter generation, 4.5th-generation platforms captured 41.37% of the fighter aircraft market share in 2025; 6th-generation systems are forecasted to grow at 8.16% CAGR between 2026 and 2031.
* By mission role, air-superiority platforms accounted for 48.31% of the market in 2025, and the multi-role segment is set to grow by a 6.25% CAGR from 2026 to 2031.
* By engine configuration, single-engine models accounted for 51.88% of the fighter aircraft market size in 2025, whereas twin-engine platforms are set to grow at a 5.18% CAGR over the forecast window.
* By geography, North America retained 36.62% fighter aircraft market share in 2025, while Europe is projected to post the fastest 6.43% CAGR through 2031.

Key Market Trends

Market Trends and InsightsDrivers Impact Analysis of Fighter Aircraft Market*Driver | (~) % Impact on CAGR Forecast | Geographic Relevance | Impact Timeline |
Increasing defense budgets in emerging APAC economies | +1.20% | APAC core, spill-over to MEA | Medium term (2-4 years) |
Recapitalization of aging 4th-gen fleets with 5th-gen aircraft | +0.90% | North America, Europe | Long term (≥4 years) |
Advanced avionics enabling multi-domain operations | +0.70% | Global | Medium term (2-4 years) |
Indigenous fighter programs for strategic sovereignty | +0.80% | APAC, Europe, Middle East | Long term (≥4 years) |
Rapid prototyping and digital-twin design workflows | +0.40% | Global | Short term (≤2 years) |
Export-credit and G-to-G financing packages | +0.30% | Global | Short term (≤2 years) |
Source: Mordor Intelligence |

Competitive Landscape

Competitive Landscape

The fighter aircraft industry remains moderately consolidated. Five incumbents—Lockheed Martin Corporation, The Boeing Company, Airbus SE, Dassault Aviation SA, and BAE Systems plc—accounted for a major share of new-build deliveries in 2024. Second-tier challengers like Saab, KAI, HAL, and Turkish Aerospace capture niche orders tied to sovereign-capability agendas.

Competitive focus is shifting from airframe performance to software and mission-systems agility. In 2025, the US Air Force selected General Atomics and Anduril as CCA finalists, signaling openness to non-traditional primes that excel in autonomy and rapid prototyping. Partnerships across cybersecurity, AI, and edge-cloud computing proliferate as OEMs seek digital supremacy.

Sustainability also shapes differentiation. In 2025, Lockheed Martin approved 50% synthetic-fuel blends for the F-35 fleet, and Airbus is exploring SAF compatibility for FCAS demonstrators. Suppliers able to certify low-carbon operations gain ESG credibility, which increasingly influences procurement scoring in Europe.

Fighter Aircraft Industry Leaders* Lockheed Martin Corporation

* The Boeing Company

* Airbus SE

* Dassault Aviation SA

* BAE Systems plc

* *Disclaimer: Major Players sorted in no particular order

Scope Methodology P Space

This market covers the value of fighter aircraft sold for military use, including new-build fixed wing fighter platforms and major aircraft level upgrades that extend capability for combat missions (air-to-air, air-to-ground, and electronic warfare).

Scope exclusions: We exclude unmanned combat aerial vehicles, weapons and munitions, routine maintenance and spares, pilot training services, and ground support equipment unless they are bundled within an aircraft procurement or upgrade contract.

Segmentation Container

* By Take-off and Landing* Conventional Take-off and Landing (CTOL)
* Short Take-off and Landing (STOL)
* Vertical Take-off and Landing (VTOL/STOVL)

* By Fighter Generation* 4th Generation
* 4.5th Generation
* 5th Generation
* 6th Generation/NGAD

* By Engine Configuration* Single-Engine
* Twin-Engine

* By Mission Role* Air-Superiority
* Multi-Role
* Close-Air-Support/Strike

* By End User* Air Force

* Naval Aviation
* Marine/Army Aviation

* By Geography* North America* United States
* Canada
* Mexico

* Europe* United Kingdom
* France
* Germany
* Russia
* Rest of Europe

* Asia-Pacific* China
* India
* Japan
* South Korea
* Rest of Asia-Pacific

* South America* Brazil
* Rest of South America

* Middle East and Africa* Middle East* United Arab Emirates
* Saudi Arabia
* Rest of Middle East

* Africa* South Africa
* Rest of Africa

Frequently Asked Questions

How large is the fighter aircraft market in 2026?

The fighter aircraft market size was USD 52.82 billion in 2026 and is projected to reach USD 64.84 billion by 2031.

Which segment is growing fastest through 2031?

Naval aviation demand leads with a 7.72% CAGR, driven by Indo-Pacific carrier acquisitions and blue-water strategies.

What share do 4.5th-generation platforms hold today?

5th-generation fighters accounted for 41.37% of fighter aircraft market share in 2025.

Which companies dominate current deliveries?

Lockheed Martin Corporation, The Boeing Company, Airbus SE, Dassault Aviation SA, and BAE Systems plc collectively shipped more than 65% of new fighters in 2024.

How are pilot shortages affecting procurement?

Persistent pilot deficits are accelerating investment in autonomous loyal-wingman systems to sustain sortie rates without proportional increases in trained pilots.

What environmental measures impact future fighters?

New particulate-matter limits and synthetic-fuel requirements in the US and Europe compel OEMs to certify engines for lower emissions and higher SAF blends.