

Flight Management Systems Market Size & Share Analysis - Growth Trends and Forecast (2026 - 2031)

> ****Industry:**** Commercial Aviation & Avionics (Aerospace & Defense)
> ****Source:**** <https://www.mordorintelligence.com/industry-reports/flight-management-systems-market>
> ****Scraped Date:**** 2026-09-17

Executive Market Summary

Market Metric	Details
Base Market Size	USD 4.70 billion
Projected Forecast (2031)	USD 4.70 billion
Growth Rate (CAGR)	5.93 %
Largest Market Region	N/A
Fastest-Growing Region	N/A

Market Visualizations & Infographics

! [Major players in Flight Management Systems industry](images/chart_2.png)

! [Flight Management Systems Market Size](images/chart_3.png)

! [Flight Management Systems Market Share by Component, 2025](images/chart_4.png)

! [Flight Management Systems Market Share by Fit, 2025](images/chart_5.png)

! [Flight Management Systems Market Growth Rate by Region](images/chart_6.png)

! [Flight Management Systems Market Concentration](images/chart_7.png)

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Comprehensive Research Analysis

Overview Points List Flex 49 Share Feature End

Market Overview

Study Period | 2019 - 2031 |
Market Size (2026) | USD 4.70 Billion |
Market Size (2031) | USD 6.27 Billion |
Growth Rate (2026 - 2031) | 5.93 % |
Fastest Growing Market | Asia-Pacific |
Largest Market | North America |
Market Concentration | Medium |
Major Players*Disclaimer: Major Players sorted in no particular order

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Market Overview

Flight Management Systems Market Analysis by Mordor Intelligence The flight management systems market size was valued at USD 4.44 billion in 2025 and estimated to grow from USD 4.70 billion in 2026 to reach USD 6.27 billion by 2031, at a CAGR of 5.93% during the forecast period (2026-2031). Higher commercial aircraft production, airline fuel-efficiency programs, and regulatory adoption of performance-based navigation support the flight management systems market. These factors create demand for new installations and software updates on aircraft already in service. Suppliers are also developing connected and software-defined architectures that can support navigation updates, data exchange, and new cockpit functions. Competition centers on certified linefit positions, where a supplier can establish a long-term aftermarket relationship with an aircraft operator. Delivery backlogs, component constraints, and cybersecurity certification requirements can defer installations, especially for newer aircraft programs.

Key Report Takeaways

- * By component, hardware held 65.78% of the flight management systems market share in 2025, while software is projected to grow at a 7.41% CAGR through 2031.
- * By aircraft type, commercial aviation accounted for 74.89% of 2025 revenue, while urban air mobility is projected to grow at a 10.84% CAGR through 2031.
- * By fit, linefit installations accounted for 73.39% of 2025 revenue, while retrofit is projected to grow at a 6.91% CAGR through 2031.
- * By installation type, dual or triple-redundant FMS configurations accounted for 58.33% of 2025 revenue and were also the fastest-growing installation type, with a 7.38% CAGR through 2031.
- * By geography, North America held 33.16% of the flight management systems market share in 2025, while Asia-Pacific is projected to grow at an 8.82% CAGR through 2031.

Key Market Trends

Global Flight Management Systems Market Trends and Insights Drivers Impact Analysis*

Driver	(~) % Impact on CAGR Forecast	Geographic Relevance	Impact Timeline
Rising production rates of single-aisle commercial aircraft	+1.4%	Global, led by North America and Europe OEM hubs	Short term (≤ 2 years)
Increasing airline focus on fuel efficiency and operating cost reduction	+1.1%	Global, concentrated in Asia-Pacific and Middle East carriers	Medium term (2–4 years)
Mandatory compliance with advanced navigation performance standards	+0.9%	Global; Asia-Pacific and Middle East and Africa compliance lag driving retrofit pipeline	Medium term (2–4 years)
Expanding adoption of connected aircraft and real-time analytics	+0.8%	North America and Europe early adopters; Asia-Pacific spill-over	Medium term (2–4 years)
Advancements in AI-enabled cockpit decision-support systems	+0.7%	North America, Europe, growing Asia-Pacific adoption	Long term (≥ 4 years)
Integration of FMS with next-generation ATM platforms	+0.6%	Global; SESAR (Europe) and NextGen (US) as anchors	Long term (≥ 4 years)

Source: Mordor Intelligence |

Competitive Landscape

Competitive Landscape

The flight management systems market is moderately consolidated among large avionics suppliers. Honeywell International Inc., Thales Group, and RTX Corporation hold strong positions in commercial linefit programs. Their competitive advantage stems from certification expertise, established relationships with aircraft manufacturers, and the ability to support systems throughout long operating lifecycles. A linefit selection can create a long-term aftermarket relationship through repairs, maintenance, software updates, and data services. This structure makes it difficult for a new supplier to replace an installed prime system and makes competition for aircraft programs more important than a one-time equipment sale.

The flight management systems market also offers opportunities in military modernization, retrofit systems, and UAM navigation. Curtiss-Wright's C-17 mission-computer award shows how open-architecture procurement can create opportunities alongside traditional defense suppliers. Garmin and Universal Avionics address retrofit demand with modular certified systems for different aircraft categories. Safran's acquisition of Collins Aerospace's flight-control and actuation activities in July 2025 added a broader set of flight-system capabilities. The transaction can support bundled offerings across flight controls, navigation, and related systems. As no combined market share for the leading companies was provided, the available information supports a moderate, rather than highly concentrated, market description.

Flight Management Systems Industry Leaders* Honeywell International Inc.

- * Thales Group
- * RTX Corporation
- * Garmin Ltd.
- * GE Aerospace (General Electric Company)

* *Disclaimer: Major Players sorted in no particular order
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Component Component 3 Scope Of The Report Bottom

Global Flight Management Systems Market Report ScopeA flight management system (FMS) is a core onboard computer system in modern aircraft. It automates flight planning, multi-sensor navigation, and performance optimization. The system significantly reduces crew workload by calculating precise lateral and vertical flight paths, managing fuel consumption, and synchronizing with the autopilot.

The flight management systems market is segmented by component, aircraft type, fit, installation type, and geography. By component, the market is segmented into hardware and software. By aircraft type, the market is segmented into commercial aviation, military aviation, general aviation, unmanned aerial systems (UAS), and urban air mobility (UAM). By fit, the market is segmented into linefit and retrofit. By installation type, the market is segmented into single-FMS and dual/triple-redundant FMS. The report also covers the market sizes and forecasts for the flight management systems market in major countries across different regions. For each segment, the market size is provided in terms of value (USD).

By ComponentHardware | Flight Management Computer (FMC) |
| Control Display Unit (CDU) |
| Visual Display Unit (VDU) |
Software |

Segmentation Accordion Item

By GeographyNorth America | United States |
| Canada |
| Mexico |
Europe | United Kingdom |
| France |
| Germany |
| Italy |
| Rest of Europe |
Asia-Pacific | China |
| India |
| Japan |
| South Korea |
| Australia |
| Rest of Asia-Pacific |
South America | Brazil |
| Rest of South America |
| |
Middle East and Africa | Middle East | Saudi Arabia |
| | United Arab Emirates |
| | Rest of Middle East |
| |
| Africa | South Africa |
| | Rest of Africa |

Frequently Asked Questions

What is driving demand for flight management systems?

Commercial aircraft output, fuel-efficiency needs, performance-based navigation requirements, and connected aircraft functions support demand for new systems and upgrades.

Which component is growing fastest?

Software is the fastest-growing component, with a projected 7.41% CAGR through 2031, while hardware held 65.78% share in 2025.

Which aircraft category has the strongest growth outlook?

Urban air mobility (UAM) is projected to be the fastest-growing aircraft category at a 10.84% CAGR through 2031.

Why are retrofit installations increasing?

Retrofit demand is supported by aging aircraft, navigation compliance needs, service-life extension, and cockpit modernization, with a projected 6.91% CAGR through 2031.

Which region is growing fastest?

Asia-Pacific is projected to grow at an 8.82% CAGR through 2031, supported by commercial fleet expansion in India, China, and Southeast Asia.

What limits adoption of advanced flight management systems?

Aircraft delivery delays and the time needed to certify cybersecure avionics systems can defer installations and new program deployment.