ANMD-MRS32-320 · Sustainable Aviation & Maritime

eVTOL Urban Air Mobility Aircraft

A Global Sustainability Due Diligence & Market Research Study

History 2020–2024 · Base Year 2025 · Forecast 2025–2032 · Outlooks 2035 / 2040 / 2050 · Currency US$

WHY THIS REPORT

eVTOL urban air mobility aircraft deliver zero-emission, low-noise flight that relieves ground congestion. Multirotor, lift-plus-cruise and vectored-thrust eVTOLs let air-mobility operators, airlines and logistics providers move people and cargo over cities electrically. This decision-grade study sizes the global market three ways — value, aircraft delivered and certified types — across aircraft type, sub-type and application, across seven regions and four scenarios to 2032, with outlooks to 2050.

SUSTAINABILITY & SDG IMPACT — THE ANMD LENS

Sustainability is this report's backbone, not an afterthought. Beyond mobility, eVTOL aircraft deliver measurable zero-emission urban flight, low-noise operation and new short-hop mobility, while battery materials and lifecycle circularity shape the resource story.

Mapped Sustainable Development Goals:

SDG 2	SDG 6	SDG 7	SDG 13	SDG 15
Zero Hunger	Clean Water	Affordable Clean Energy	Climate Action	Life on Land

Measurable sustainability outcomes assessed:

- Zero-emission urban flight replacing combustion rotorcraft
- Low-noise operation suited to dense city environments
- New short-hop passenger and cargo mobility capacity
- Battery energy density, materials and end-of-life circularity as material risks

Framework alignment: Double materiality mapped to GRI, SASB, ISSB, TCFD, TNFD, CSRD and the EU Taxonomy, with greenwashing and SDG-washing screens applied throughout.

WHAT'S INSIDE AT A GLANCE

53 Chapters	**9** Report Parts	**7** Regions Covered	**40+** Country Markets
2025–32 Forecast Horizon	**4** Forward Scenarios	**25+** Companies Profiled	**5** SDGs Mapped

REPORT COVERAGE

Geographic scope: North America, Europe, Asia Pacific, Latin America, Africa, Middle East and Rest of World — with named country intelligence. North America leads certification; Europe scales under EASA; Asia Pacific is rising on autonomous operations.

MARKET OVERVIEW

From prototype to type certification — electric VTOL opens a new urban mobility layer.

The eVTOL urban air mobility market is moving from prototype to type certification and early service. Demand is driven by urban congestion, advanced-air-mobility ambition and zero-emission flight, supported by maturing electric powertrains and certification progress. The market is read three ways — value, aircraft delivered and certified types — and forecast under four scenarios, each region reported separately.

- North America leads certification — the United States, where Joby and Archer lead FAA certification and service plans
- Europe scales on EASA — Germany's Lilium and Volocopter advance under EASA rules
- Aircraft type and sub-type segment the value — across multirotor, lift-plus-cruise and vectored-thrust
- Zero-emission urban flight is the differentiator — low-noise electric VTOL helicopters cannot match in cities

REGIONAL OUTLOOK

Across seven reporting regions, the report separates early commercialisation leaders from high-growth and emerging markets — each profiled in full rather than aggregated into Rest of World.

Region	Stage	Lead Markets & Drivers
North America	Certification leader	United States, Canada — FAA certification, service launch
Europe	EASA scaling	Germany, UK, France — EASA rules, OEM development
Asia Pacific	Rising	China, Japan, South Korea — autonomous operations, manufacturing
Middle East	High-growth	UAE, Saudi Arabia — vertiport investment, sovereign capital
Latin America	Emerging	Brazil, Mexico — metropolitan congestion use-cases
Africa	Frontier	South Africa — connectivity and emergency-services pilots

KEY MARKET DRIVERS & RESTRAINTS

Drivers

- Urban-congestion and mobility demand
- Advanced-air-mobility ambition
- Zero-emission and low-noise targets
- Logistics and emergency-services use-cases
- Electric-powertrain and autonomy technology gains

Restraints

- Certification and airworthiness timelines
- Battery energy-density and range limits
- Vertiport and airspace infrastructure
- Public-acceptance and noise concerns
- High development and unit cost

SEGMENTATION SNAPSHOT

By Aircraft Type	Multirotor · lift-plus-cruise · vectored-thrust
By Sub-Type	Piloted · remotely-piloted · autonomous
By Component	Airframes · electric motors · batteries · rotors · avionics · flight controls
By Application	Passenger · cargo · emergency services
By End User	Air-mobility operators · airlines · logistics providers · emergency services
By Business Model	Aircraft sale · operations · mobility-as-a-service

TABLE OF CONTENTS — PARTS & CHAPTERS

The full report is organised into nine parts across 53 chapters, listed below. Detailed sub-headings, country tables and directories are provided in the full report.

Part V — Company, Competition, Patent and Project Intelligence

Part VI — Sustainability, ESG, SDG, Climate and Natural-Capital Intelligence

Part VII — Supply Chain, Policy, Legal, Economics and Finance

Part VIII — Scenario, Future Intelligence and Final Due Diligence Verdict

Part IX — Annexes, Directories and Reference Material

COMPETITIVE & INVESTMENT SNAPSHOT

The competitive field spans aerospace majors, eVTOL pure-plays and electric-powertrain specialists. Deal activity — certification milestones, airline and operator orders, and vertiport partnerships — signals a market consolidating around bankable, repeatable designs.

Representative players profiled in the full report:

Joby Aviation, Inc. · Archer Aviation Inc. · Lilium N.V. · Volocopter GmbH · EHang Holdings Limited · and further profiled players across the value chain.

Investment intelligence: venture, infrastructure, development, climate and blended finance, green bonds and sustainability-linked loans — culminating in a bankability assessment and a clear, condition-based investment view.

KEY QUESTIONS THIS REPORT ANSWERS

? How large is the global eVTOL urban air mobility aircraft market, and how fast will it grow to 2032?

? Which regions, countries and segments offer the strongest risk-adjusted opportunity?

? Who leads, and where is the competitive and patent white space?

? Is the investment case bankable — and under what conditions?

? How does the technology align with the SDGs and emerging disclosure regulation?

WHY ANMD — THE DIFFERENCE

Most market studies stop at units and revenue. This report is built as a sustainability due diligence instrument — fusing market sizing with ESG, SDG, climate, water and natural-capital intelligence and a decision-ready bankability assessment in a single architecture.

› **Triangulated sizing —** every market read three ways (value, aircraft delivered and certified types) so value, volume and certified types views reconcile rather than conflict.

› **Region-honest forecasting —** Latin America, Africa and the Middle East reported in full, never hidden inside Rest of World, every forecast resolved to the 2025 base year.

› **Integrated evidence base —** company, patent and project databases linked to the analysis, with published-filing patents and FTO treated as an indicator, not a legal conclusion.

› **No-fabrication discipline —** every estimate carries a data-confidence rating and disclosed sources; gaps are flagged for further diligence, never filled with invented numbers.

› **Anti-greenwashing rigour —** SDG-washing and greenwashing screens plus claim-substantiation checks built into the ESG and project analysis.

› **Decision-first structure —** 9 Parts and 53 Chapters culminating in stakeholder playbooks and a clear, condition-based bankability view.

WHO SHOULD BUY THIS REPORT

Investors and infrastructure / PE funds, aerospace OEMs, air-mobility operators, airlines, logistics providers, vertiport developers, regulators, lenders, policymakers, and corporate strategy and ESG teams.

Access the Full Report

The complete report delivers all 53 chapters in full, with every sub-heading, country table, company and patent directory, forecast model and due diligence checklist.

Purchase at **www.anewmarketdynamics.com** · Standard & Premium licences · Single-Site (SSL) and Global-Site (GSL) options at checkout.

Want the Complete Detailed Table of Contents?

This prospectus lists the nine parts and 53 chapters. The complete detailed table of contents — every sub-heading, country table, exhibit, company and patent directory and annex — is available on request to registered users. To receive it, register with your official company email at **www.anewmarketdynamics.com**. The full detailed table of contents will be sent directly to your registered company email address.