



# THE FUTURE OF AIR MOBILITY FORECAST & TRENDS

PARIS **AIR** MOBILITY

JUNE 20, 2023

**SMG**  
CONSULTING



# SHOW ME THE MONEY MARKET SIZE

\$

**\$61**

PWC  
(billion, 2030)



**\$115**

Deloitte  
(billion, 2035)



**\$1,000**

Morgan Stanley  
(billion, 2040)

**BIG**



# 5 MORE MINUTES DELAYS PUSH TIMELINES

**Vertical Aerospace  
Certification Timeline Slips  
To 2026**

**Lilium Delays eVTOL Certification Timeline to 2025**

**EHANG EXPECTS EH216 CERTIFICATION IN MID-  
2022 AND LAUNCH OF WORLD'S FIRST EVTOL  
REVENUE FLIGHTS**

Eviation has set a 2024 or 2025 goal to earn Federal  
Aviation Administration certification

**Volocopter Air Taxi Services Confirmed for  
2023, Tickets Are Already Sold Out**



# HARDWARE IS HARD

## DEVELOPMENT PROGRESS – MID 2023

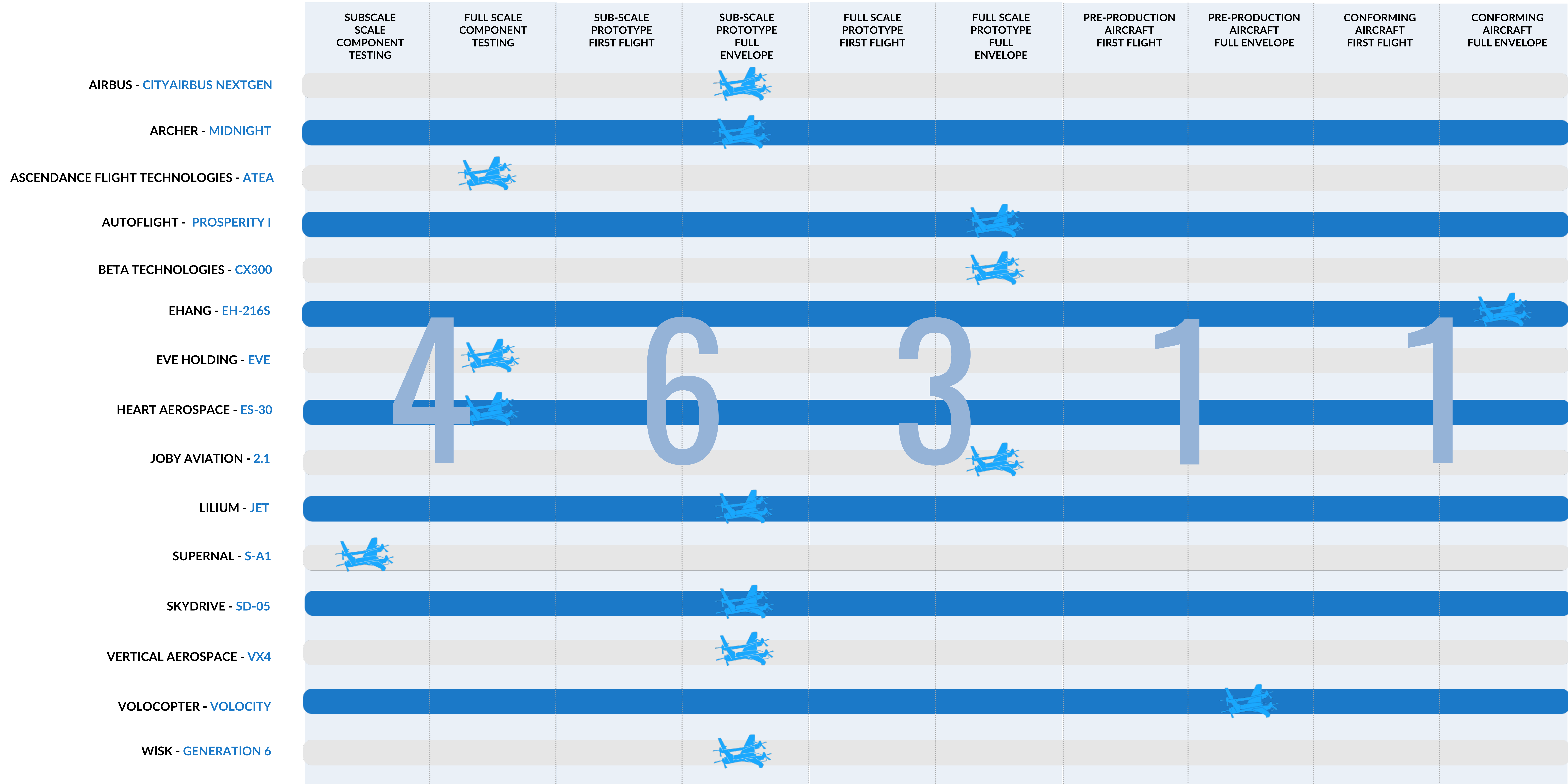


SELECTION OF OEMs PRESENT AT THE 2023 PARIS AIR SHOW



# HARDWARE IS HARD

## DEVELOPMENT PROGRESS – MID 2023



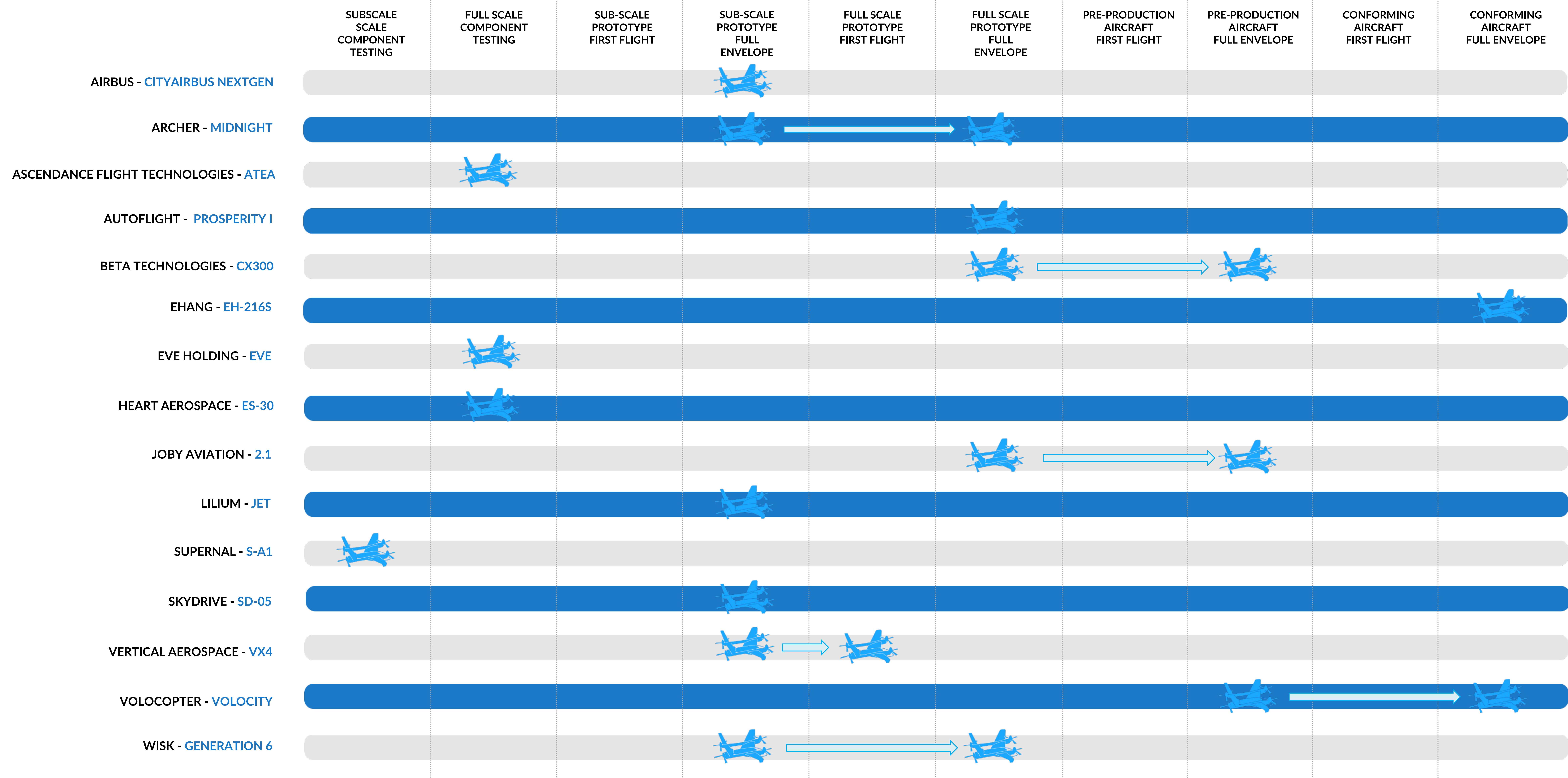
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SELECTION OF OEMs PRESENT AT THE 2023 PARIS AIR SHOW



# HARDWARE IS HARDER

## DEVELOPMENT PROGRESS – END 2023



SELECTION OF OEMs PRESENT AT THE 2023 PARIS AIR SHOW



# HARDWARE IS HARDER

## DEVELOPMENT PROGRESS – END 2023

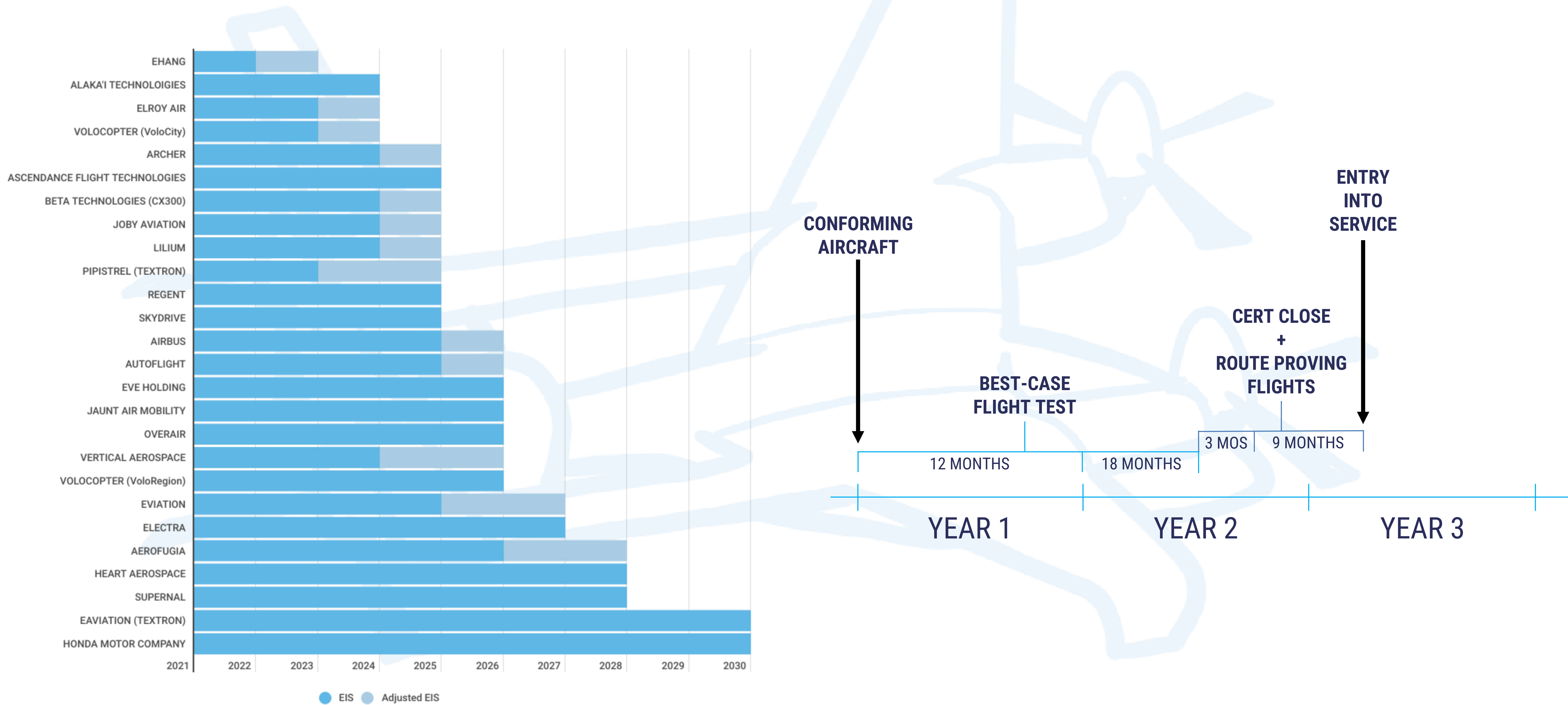


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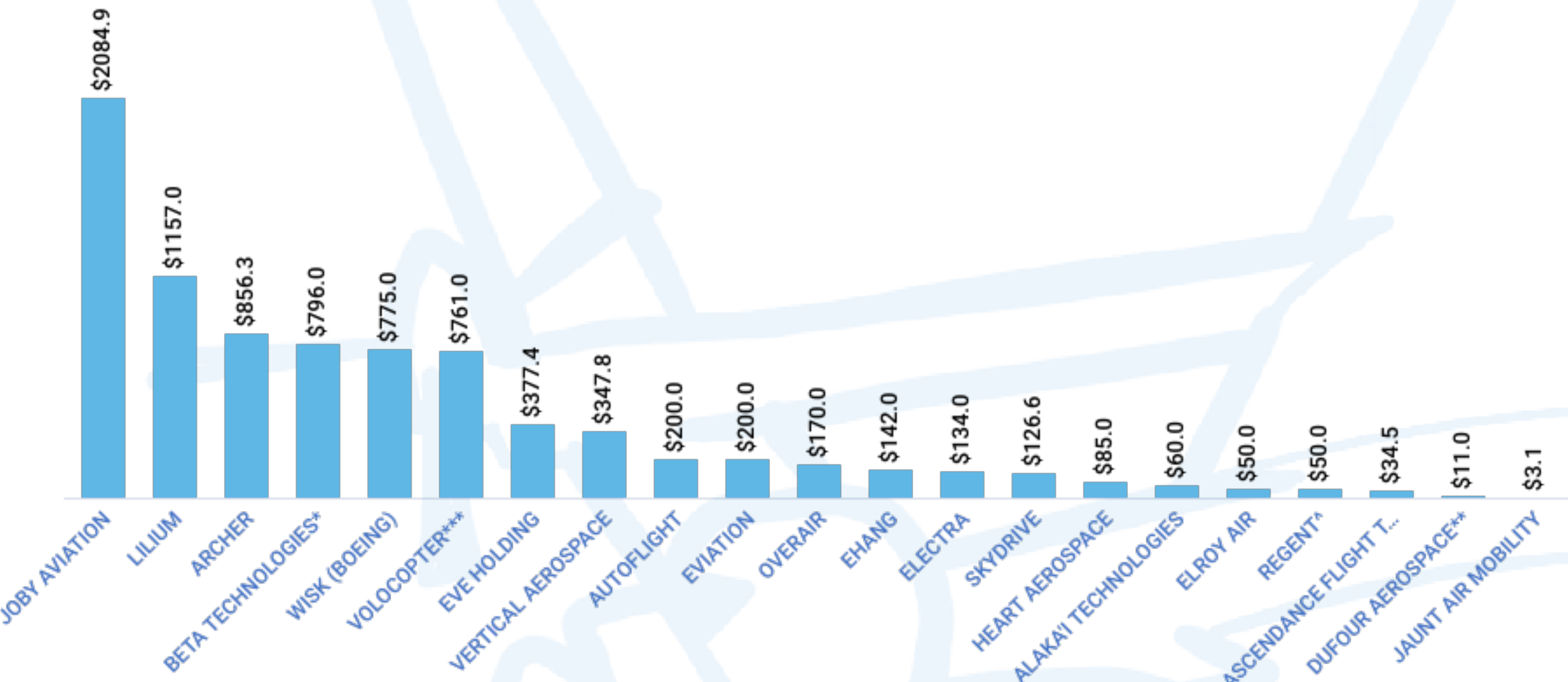
# ARE WE THERE YET

## OPTIMISTIC TIMELINES



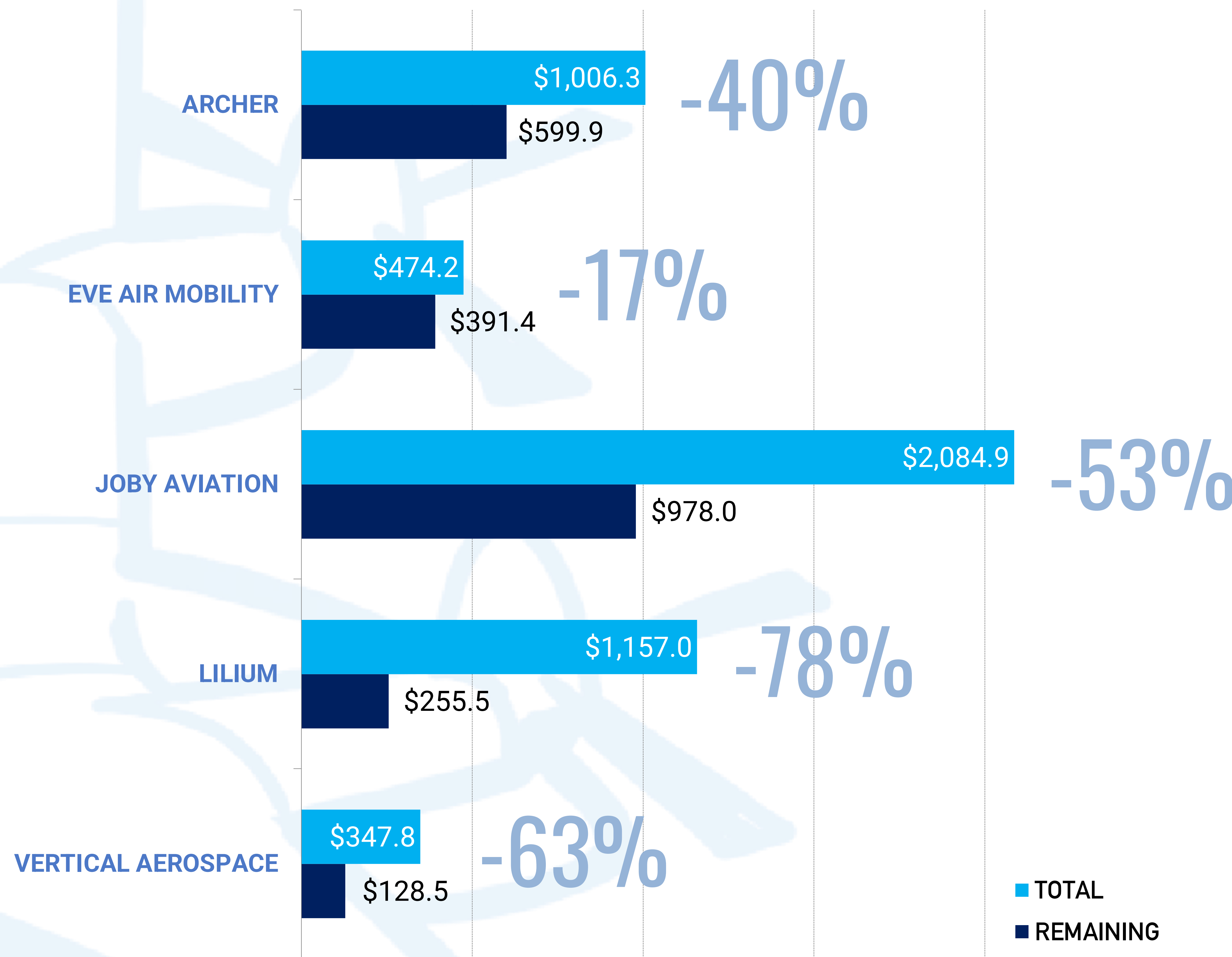


# MORE MONEY, MORE PROBLEMS FUNDING



TOP 28 OEMs

9-10 billion USD



TOP 15 OEMs

ADD'L 2.5-4 billion USD



# WHY CAN'T WE BE FRIENDS REGULATIONS



- Published specific regulations under SC-VTOL
- DAL Level A
- Finalizing specific regulations under Power Lift
- DAL per vehicle type
- Creating own regulations – not following EASA/FAA
- DAL Level different for cargo UAV and pax aircraft

## HARMONIZATION?



# HAVE AAM, WANT TO LAND IS THE INFRASTRUCTURE READY?

\$7,507.6

OEMs

62 times more funding  
has gone to OEMs

\$122.1

VERTIPOINT COMPANIES

The market will need  
four time more vertiport  
companies than OEMs

12  
VERTIPOINT COMPANIES

3  
OEMs



# ONE USE CASE TO RULE THEM ALL USE CASES

	URBAN AIR MOBILITY	REGIONAL AIR MOBILITY	CARGO	
DEMAND	PUSH	PULL	PULL	UAM demand = customer acceptance
MARKET SHARE (2030)	32%	6%	60%	Cargo is the most immediate use case
MARKET SHARE (2040)	60%	15%	25%	UAM: long term win
EIS TIMING	2024	2026	2023	
CERTIFICATION RISK	HIGH	LOW	MEDIUM	Most RAM vehicles are eCTOL
INVESTMENT TO DATE (ARI)	68%	20%	10%	Fastest growing market under-funded
OEMs TARGETING MARKET (ARI)	57%	21%	11%	
OEMs TARGETING MARKET (TRACKED)	47%	31%	10%	More and more RAM (and CTOL) vehicles
PROPULSION (ALL ELECTRIC, TRACKED)	91%	57%	40%	RAM and Cargo benefit from hybrid
PROPULSION (HYBRID, TRACKED)	9%	43%	60%	
INFRASTRUCTURE AVAILABILITY	NO	YES	YES	UAM success = infrastructure



# WINGS



# RUNWAYS



# HYBRID



*Au revoir...*





*A l'année prochaine*  
*Paris*







SERGIO CECUTTA



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