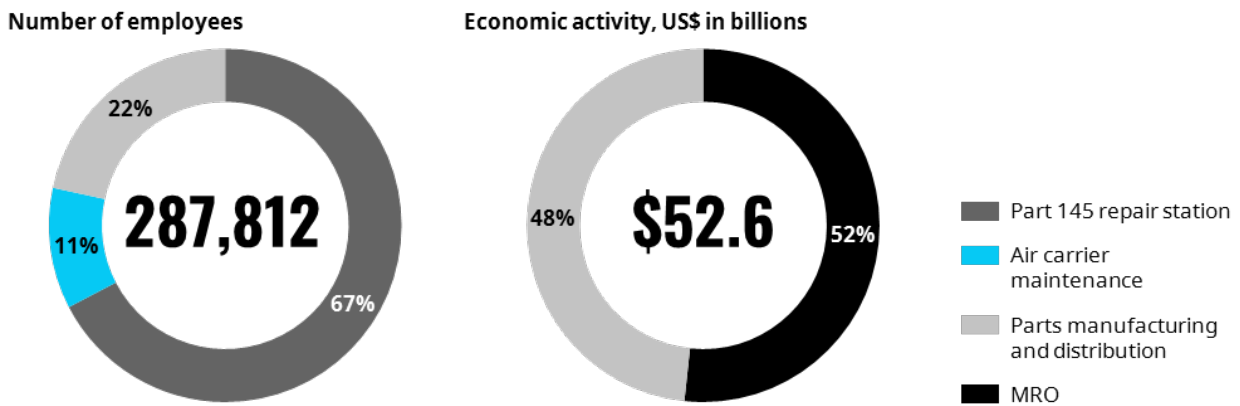




US employment and economic impact

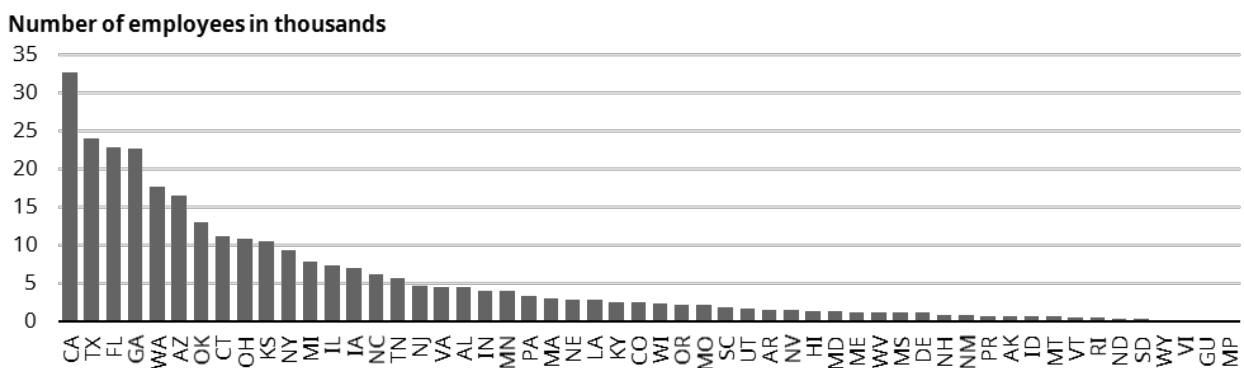
The US civil aviation maintenance industry employs almost 288,000 workers and generates \$52.6 billion in economic activity. Compared to 2018, overall employment has been slightly negative, while economic activity has increased 4.4 percent. With over 225,000 workers, the MRO segment accounts for 78 percent of these employees. Companies that are certificated by the FAA under Part 145 are the largest employers with just under 194,000 workers in 2019, a 2.7 percent increase from 2018. The remaining 32,000 MRO workers are employed by air carriers in civil aviation. Despite employing three-quarters of the workers, MRO accounts for 52 percent, or \$27.2 billion of the economic activity. By contrast, the 22 percent working in parts manufacturing and distribution generate 48 percent or \$25.4 billion, of the economic activity.

Exhibit 1: US civil aviation employment and economic impact, 2020



Source: Bureau of Labor Statistics, Bureau of Transportation Statistics, Federal Aviation Authority, Oliver Wyman Analysis

Exhibit 2: US civil aviation employment and economic impact, 2020



Source: Bureau of Labor Statistics, Bureau of Transportation Statistics, Federal Aviation Authority, Oliver Wyman Analysis



Exhibit 3: US civil aviation employment and economic impact, 2019

State	Aviation Maintenance Industry Employment				Aviation Maintenance Industry Economic Activity		
	Maintenance, Repair and Overhaul (MRO)		Parts Manufacturing & Distribution	Total Employment	Maintenance, Repair and Overhaul (MRO) (\$ M)	Parts Manufacturing & Distribution (\$ M)	Total Economic Activity (\$ M)
	FAA Repair Station	Air Carrier					
AK	444	173	9	626	\$74	\$3	\$78
AL	4,270	75	26	4,371	\$523	\$10	\$534
AR	1,389	76	56	1,521	\$176	\$23	\$199
AZ	6,446	879	9,119	16,444	\$882	\$3,725	\$4,607
CA	24,429	3,088	5,056	32,573	\$3,315	\$2,065	\$5,380
CO	1,444	976	14	2,434	\$291	\$6	\$297
CT	4,565	107	6,504	11,176	\$563	\$2,657	\$3,220
DE	959	0	77	1,036	\$116	\$31	\$147
FL	19,097	2,740	899	22,736	\$2,630	\$367	\$2,997
GA	19,219	2,053	1,321	22,593	\$2,562	\$539	\$3,102
GU	7	0	0	7	\$1	\$0	\$1
HI	681	561	8	1,250	\$150	\$3	\$153
IA	2,829	81	4,089	6,999	\$351	\$1,670	\$2,021
ID	512	60	30	602	\$69	\$12	\$81
IL	3,977	1,968	1,326	7,271	\$716	\$542	\$1,258
IN	2,766	167	1,072	4,005	\$353	\$438	\$791
KS	5,917	38	4,540	10,495	\$717	\$1,854	\$2,572
KY	938	1,502	41	2,481	\$294	\$17	\$311
LA	2,275	265	172	2,712	\$306	\$70	\$376
MA	2,039	630	247	2,916	\$321	\$101	\$422
MD	413	236	546	1,195	\$78	\$223	\$301
ME	1,011	34	119	1,164	\$126	\$49	\$175
MI	4,716	696	2,330	7,742	\$652	\$952	\$1,604
MN	2,828	732	331	3,891	\$429	\$135	\$564
MO	1,695	363	21	2,079	\$248	\$9	\$256
MP	7	0	0	7	\$1	\$0	\$1
MS	959	33	129	1,121	\$119	\$53	\$172
MT	510	71	17	598	\$70	\$7	\$77
NC	4,350	1,455	354	6,159	\$699	\$145	\$844
ND	177	27	91	295	\$25	\$37	\$62
NE	1,526	75	1,194	2,795	\$193	\$488	\$680
NH	763	9	30	802	\$93	\$12	\$105
NJ	3,394	859	413	4,666	\$512	\$169	\$681
NM	657	66	44	767	\$87	\$18	\$105
NV	729	559	107	1,395	\$155	\$44	\$199
NY	5,172	1,533	2,525	9,230	\$808	\$1,031	\$1,839
OH	7,487	314	2,921	10,722	\$940	\$1,193	\$2,133
OK	12,343	121	481	12,945	\$1,501	\$197	\$1,698
OR	1,769	291	107	2,167	\$248	\$44	\$292
PA	2,408	847	105	3,360	\$392	\$43	\$435
PR	652	0	0	652	\$79	\$0	\$79
RI	337	46	41	424	\$46	\$17	\$63
SC	1,668	151	9	1,828	\$219	\$4	\$223
SD	58	21	156	235	\$10	\$64	\$73
TN	3,018	2,000	553	5,571	\$604	\$226	\$830
TX	16,694	3,745	3,598	24,037	\$2,462	\$1,470	\$3,932
UT	743	444	422	1,609	\$143	\$172	\$315
VA	1,320	939	2,150	4,409	\$272	\$878	\$1,150
VI	9	0	0	9	\$1	\$0	\$1
VT	199	17	273	489	\$26	\$112	\$138
WA	8,721	697	8,292	17,710	\$1,134	\$3,387	\$4,522
WI	2,147	0	86	2,233	\$259	\$35	\$294
WV	1,111	6	35	1,152	\$135	\$14	\$149
WY	63	29	16	108	\$11	\$7	\$18
Total	193,857	31,855	62,100	287,812	\$27,188	\$25,367	\$52,555

Source: Bureau of Labor Statistics, Bureau of Transportation Statistics, Federal Aviation Authority, Oliver Wyman Analysis