



US CIVIL AVIATION MAINTENANCE EMPLOYMENT AND ECONOMIC IMPACT

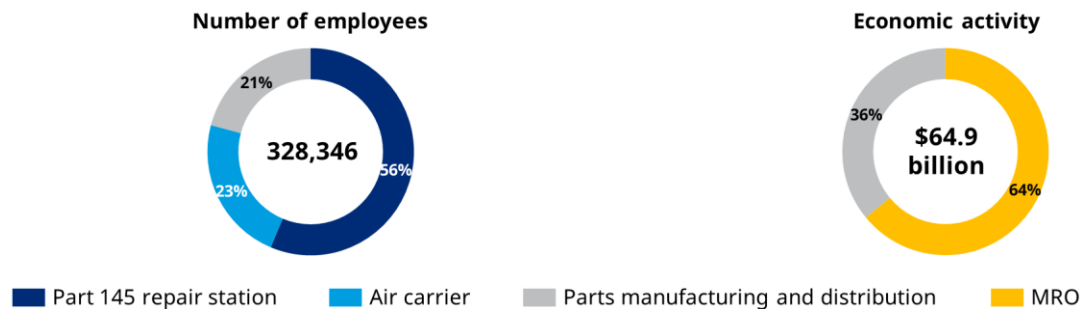
The US civil aviation maintenance industry employs nearly 329,000 workers and generates \$65 billion in economic activity. Overall employment was almost 3.5% higher at the start of this year than at the beginning of 2023, while economic activity was up 0.6%.

Companies that are certificated by the Federal Aviation Administration (FAA) under Part 145 are the largest employers, with nearly 185,000 workers at the beginning of 2024. The remaining approximately 75,000 workers are employed by commercial airlines.

The biggest chunk of both employment and economic activity is generated by maintenance, repair, and overhaul (MRO) operations. With over 259,000 employees and \$41.6 billion in revenue, the segment accounts for 79% of the industry's workforce and 64% of its economic activity.

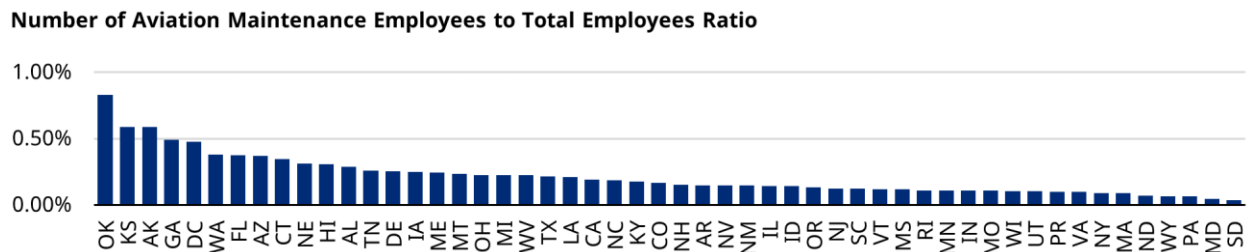
Parts manufacturing and distribution produces 36%, or \$23.4 billion, of the economic activity and employ 21% of the sector's workers, with almost 69,000 employees.

Exhibit 1: US civil aviation employment and economic impact, 2024



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

Exhibit 2: US civil aviation employment and economic impact, 2024



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



Exhibit 3: US civil aviation employment and economic impact, 2024

State	Aviation Maintenance Industry Employment				Aviation Maintenance Industry Economic Activity		
	Maintenance, Repair and Overhaul (MRO)		Parts	Total Employment	Maintenance, Repair and Overhaul (MRO) (\$ M)	Parts Manufacturing & Distribution (\$ M)	Total Economic Activity (\$ M)
	FAA Repair	Air Carrier	Manufacturing & Distribution				
	Station						
AL	4,467	125	1,656	6,248	\$735	\$565	\$1,299
AK	526	1,220	195	1,941	\$279	\$66	\$346
AZ	7,411	1,572	2,747	11,730	\$1,437	\$937	\$2,374
AR	1,391	125	516	2,032	\$243	\$176	\$418
CA	21,328	5,098	7,907	34,333	\$4,228	\$2,696	\$6,924
CO	1,577	2,690	585	4,851	\$683	\$199	\$882
CT	4,085	284	1,514	5,883	\$699	\$516	\$1,215
DE	880	19	326	1,225	\$144	\$111	\$255
DC	0	3,714	0	3,714	\$594	\$0	\$594
FL	20,914	8,185	7,753	36,852	\$4,656	\$2,644	\$7,300
GA	15,729	2,713	5,831	24,273	\$2,951	\$1,989	\$4,939
GU	7	9	3	18	\$3	\$1	\$3
HI	709	959	263	1,931	\$267	\$90	\$357
ID	625	372	232	1,229	\$160	\$79	\$239
IL	4,375	2,822	1,622	8,819	\$1,151	\$553	\$1,705
IN	2,400	275	890	3,564	\$428	\$303	\$731
IA	2,783	151	1,032	3,966	\$469	\$352	\$821
KS	6,168	132	2,287	8,587	\$1,008	\$780	\$1,788
KY	1,167	1,959	433	3,558	\$500	\$148	\$648
LA	2,201	1,141	816	4,158	\$535	\$278	\$813
ME	1,108	94	411	1,613	\$192	\$140	\$332
MD	694	354	257	1,306	\$168	\$88	\$255
MA	1,785	907	662	3,354	\$431	\$226	\$656
MI	5,358	2,656	1,986	10,000	\$1,282	\$677	\$1,960
MN	1,658	1,016	615	3,289	\$428	\$210	\$637
MS	909	123	337	1,369	\$165	\$115	\$280
MO	1,707	901	633	3,241	\$417	\$216	\$633
MT	670	313	248	1,232	\$157	\$85	\$242
NE	2,235	209	829	3,273	\$391	\$283	\$674
NV	998	971	370	2,339	\$315	\$126	\$441
NH	754	51	280	1,085	\$129	\$95	\$224
NJ	2,684	1,777	995	5,456	\$714	\$339	\$1,053
NM	786	205	291	1,282	\$159	\$99	\$258
NY	3,975	3,258	1,474	8,706	\$1,157	\$503	\$1,660
NC	4,371	3,338	1,620	9,329	\$1,233	\$553	\$1,786
ND	199	28	74	301	\$36	\$25	\$61
MP	7	0	3	10	\$1	\$1	\$2
OH	6,839	3,479	2,535	12,854	\$1,651	\$865	\$2,515
OK	10,178	448	3,773	14,400	\$1,700	\$1,287	\$2,987
OR	1,288	857	477	2,622	\$343	\$163	\$506
PA	1,821	1,537	675	4,033	\$537	\$230	\$768
PR	644	83	239	965	\$116	\$81	\$198
RI	352	63	130	546	\$66	\$45	\$111
SC	1,806	382	670	2,857	\$350	\$228	\$578
SD	60	91	22	174	\$24	\$8	\$32
TN	2,893	4,602	1,073	8,567	\$1,199	\$366	\$1,565
TX	15,419	8,978	5,716	30,113	\$3,903	\$1,949	\$5,853
UT	748	741	277	1,766	\$238	\$95	\$333
VT	240	34	89	363	\$44	\$30	\$74
VA	1,384	2,130	513	4,027	\$562	\$175	\$737
VI	0	26	0	26	\$4	\$0	\$4
WA	9,336	1,161	3,461	13,958	\$1,680	\$1,180	\$2,860
WV	1,157	5	429	1,591	\$186	\$146	\$332
WI	1,999	446	741	3,186	\$391	\$253	\$644
WY	76	95	28	199	\$27	\$10	\$37
Total	184,881	74,925	68,540	328,346	\$41,568	\$23,374	\$64,941

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