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LAMA
State of the Industry
and
MOSAIC Review

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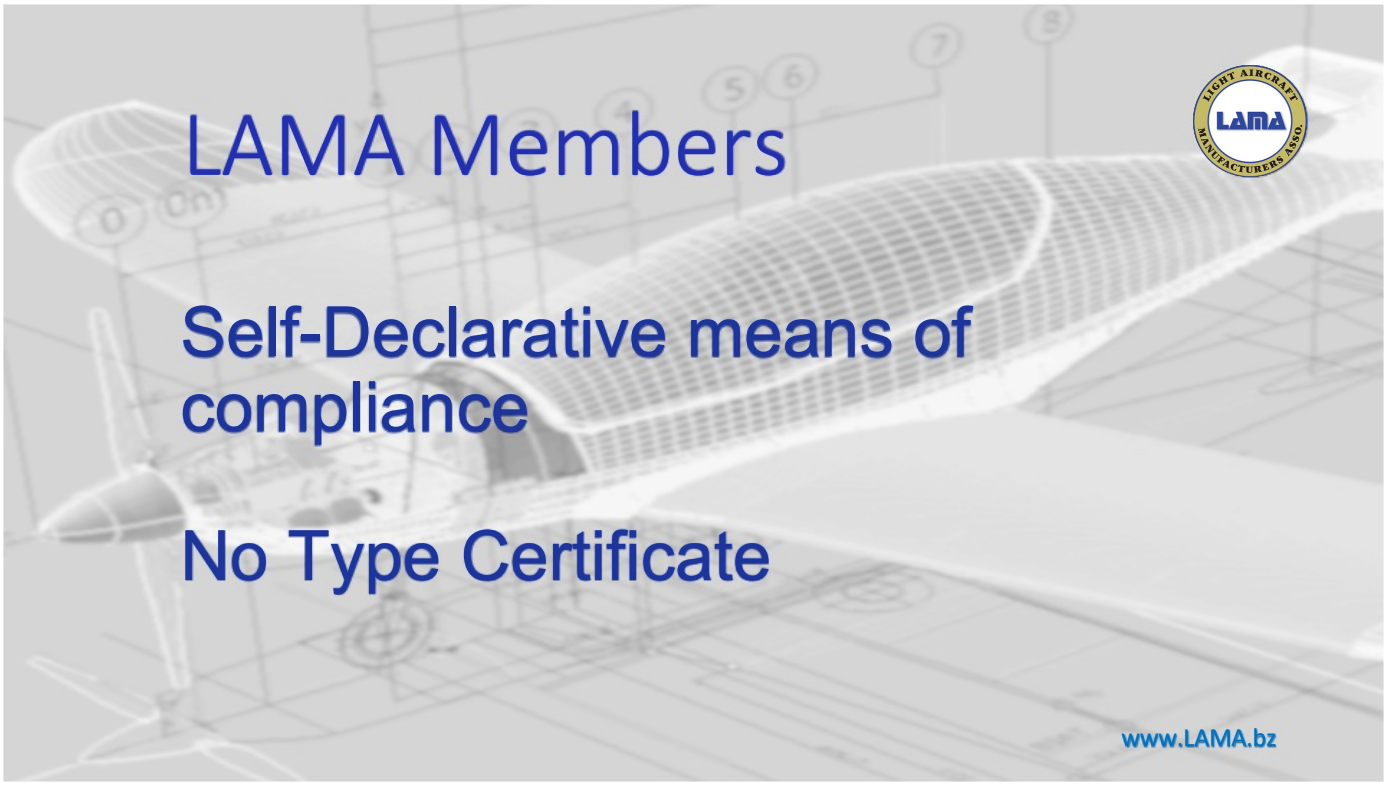
LAMA is a not-for-profit trade association that **advocates for manufacturers and suppliers** to the light aircraft industry

LAMA members are manufacturers of light sport and similar aircraft, kits, engines, propellers, parachutes, avionics, suppliers to the light aircraft industry.

To LAMA, “Light Aircraft” includes all categories, classes and types of flying craft up to four-seat capacity, microlight, ultralight, and includes emerging designs such as eVTOLs.



Here is the key point about LAMA, and this is defining.

LAMA members provide Aircraft and components that meet civil aviation authority safety requirements worldwide through **Self-Declarative means of compliance.**

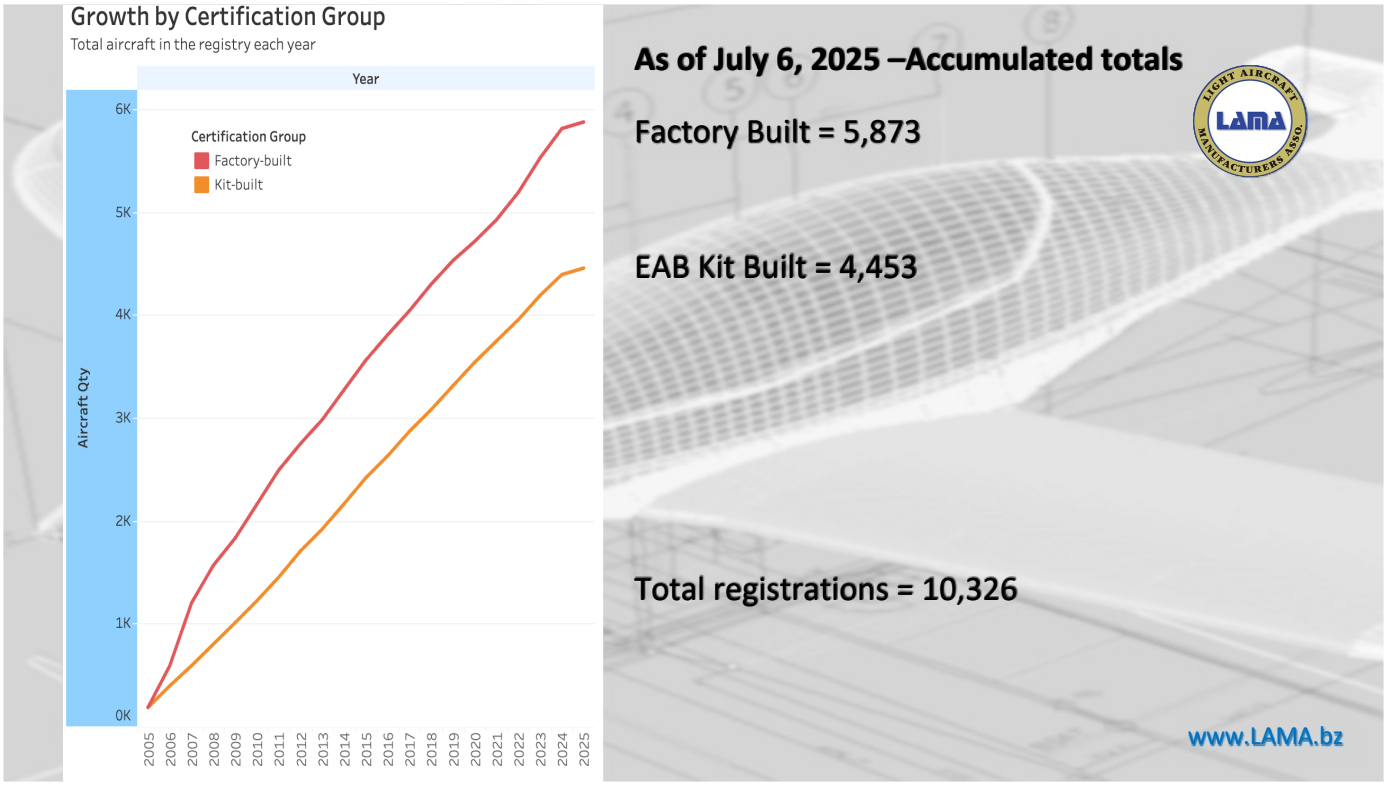
This means Aircraft that do not require a Type Certificate. Light Sport Aircraft are Self Declarative: The manufacturer declares the design and production conforms to the ASTM standards.

Ultralights are self declarative : The manufacturer declares the design is compliant to the definition.

So, lets look at Trends in these Light Sport areas

•We will look at different groupings of Light Sport Aircraft
•**SLSA:** includes only factory built, ready-to-fly aircraft. SLSA can be used for compensated operations like flight instruction and rental
•**ELSA:** are factory-built kits and converted SLSA. When built, an ELSA must conform to its SLSA origin. ELSA allow expanded maintenance privileges and some changes without factory approval. An owner can change avionics, interiors, add equipment, or even change the engine on an ELSA. An ELSA cannot be used to offer compensated flight instruction or aircraft rental.
•**EAB:** are Experimental Amateur Built kits
•**Two remaining,** smaller by number categories include **Experimental Exhibition** category, used mostly by Pipistrel for its motorglider models, and the **Primary Category** that presently counts only AutoGyro as there is no other reasonable mechanism for Gyroplanes.
•Models that pursued Primary Category back in the 1990s (example: Quicksilver GT500) have not continued with that approach.

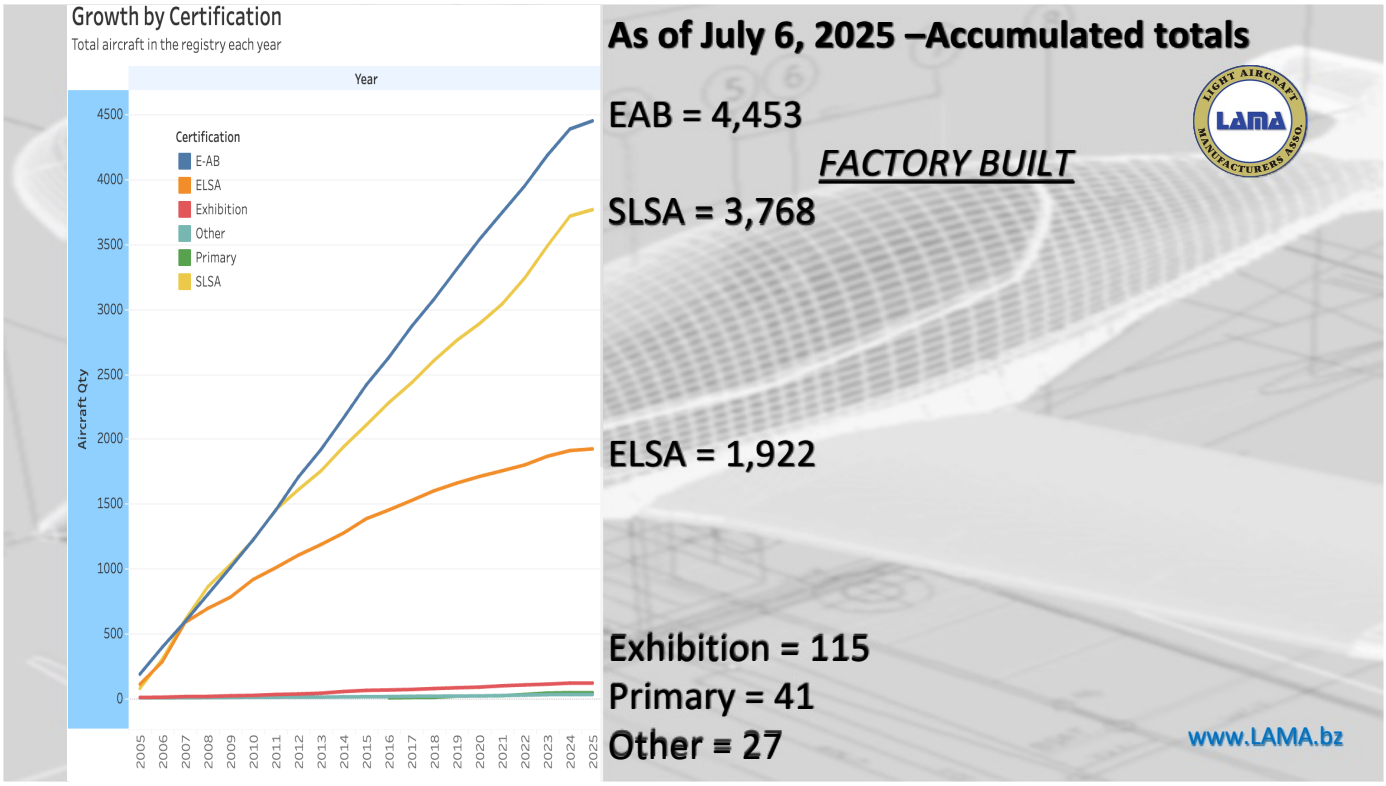
•OK Lets look at some numbers!



Here we have Factory Built Light Sport and Experimental Amateur Built kits
This information is all current As of July 6th 2025.
There are presently 5,873 Factory built aircraft. That includes SLSA, ELSA, Primary and Exhibition.
At the end of 2024 there were 5,809, so a growth of just 64 registrations at mid year

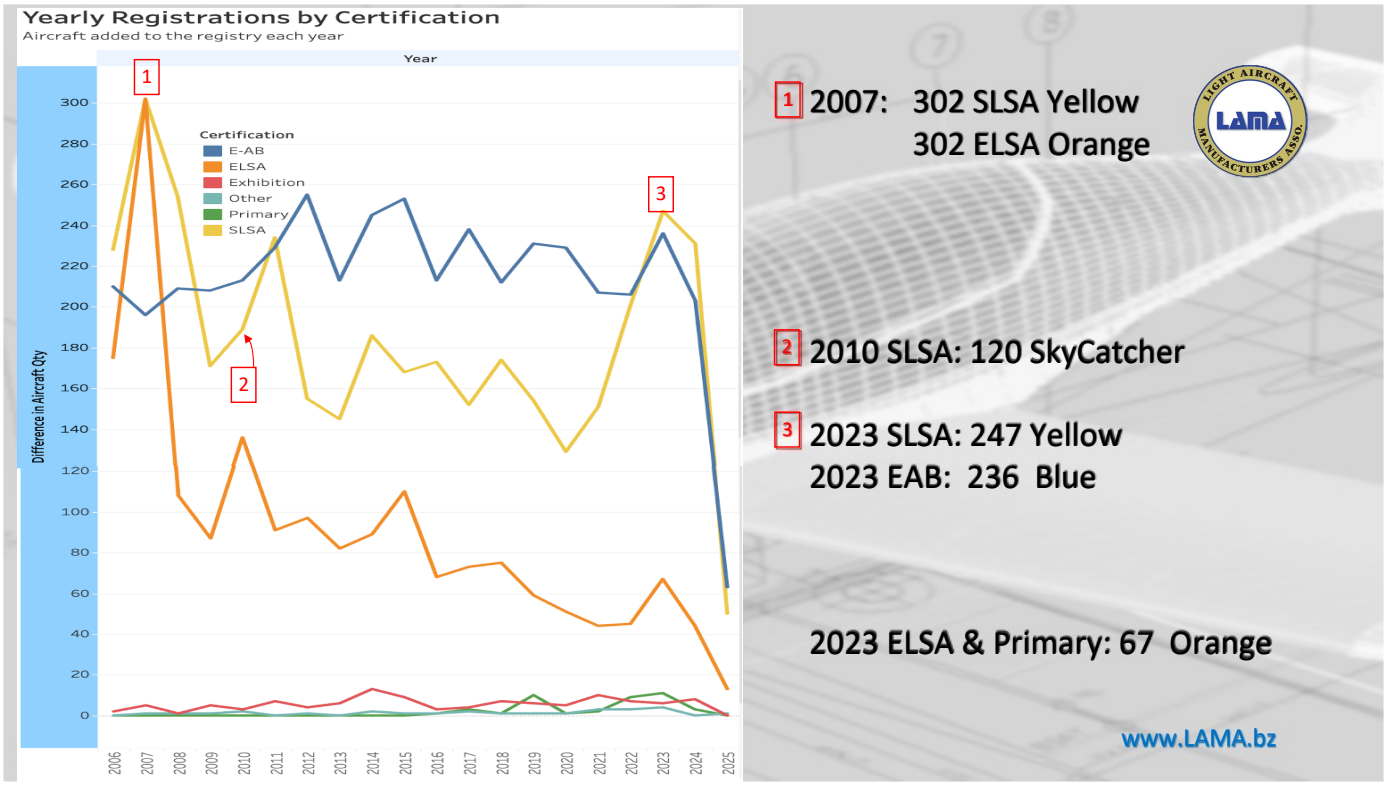
For kits, 2024 had an accumulated total of 4,390, and just over 6 months into the year another 63 have been added for a total of 4,453

That's a total of 10,326 registrations in the US presently.



Now let's break this down a little
The Experimental number at the top is the same. We are breaking down FACTORY BUILT. Factory Built includes SLSA, ELSA, Exhibition and Primary Category. And others that I suppose the FAA didn't know what to do with…☺️
Of the 5,873 Factory Built, you can see SLSA is the largest segment, followed by ELSA, Exhibition and Primary.

But to understand the market, we need to look at yearly registrations vs totals.



This is Yearly Registrations by Certification type.
This shows the surge of of the introduction of Light Sport SLSA and ELSA which started in 2005.
We see the blue line EAB pretty much holds it own,
The yellow and orange lines – S and ELSA have been less consistent. Overall, we see a gradual market decline across all registration types with ELSA having the most negative trend and all sharply dropping after 2023. That's interesting info – and not new for most manufacturers

Look at the square with #1, thats 2007, and there you see the spike of 302 of the yellow line SLSA and orange ELSA

In #2 - In 2010, see the yellow line? Of the 234 SLSA, 120 were Cessna SkyCatcher. The orange line right below- is ELSA: of the 130 something, 53 were Vans

BIG PICTURE
Aside from new aircraft sales, There has been a distinct lull in the sales of used aircraft for most of 2024. It is typical for election years to be soft, regardless of administration – it's the uncertainty. After the election, things usually go back to normal – I've always wondered, then, why hold back? The good news is the stock market has been more stable with increased aircraft

inquiries and movement toward sales in 2025

Specifically related to Light Sport, sales have stalled due to the anticipation of MOSAIC. It's human nature to hold off when you know something new is just around the corner.
Just an observation, here. We all know aviation costs by the knot and by the pound. With increased capability will come increased cost. No argument, this is normal. A caution to those holding off, the SLSA of today have a much lower price point than the new MLSA.

Regarding ENGINE MANUFACTURERS

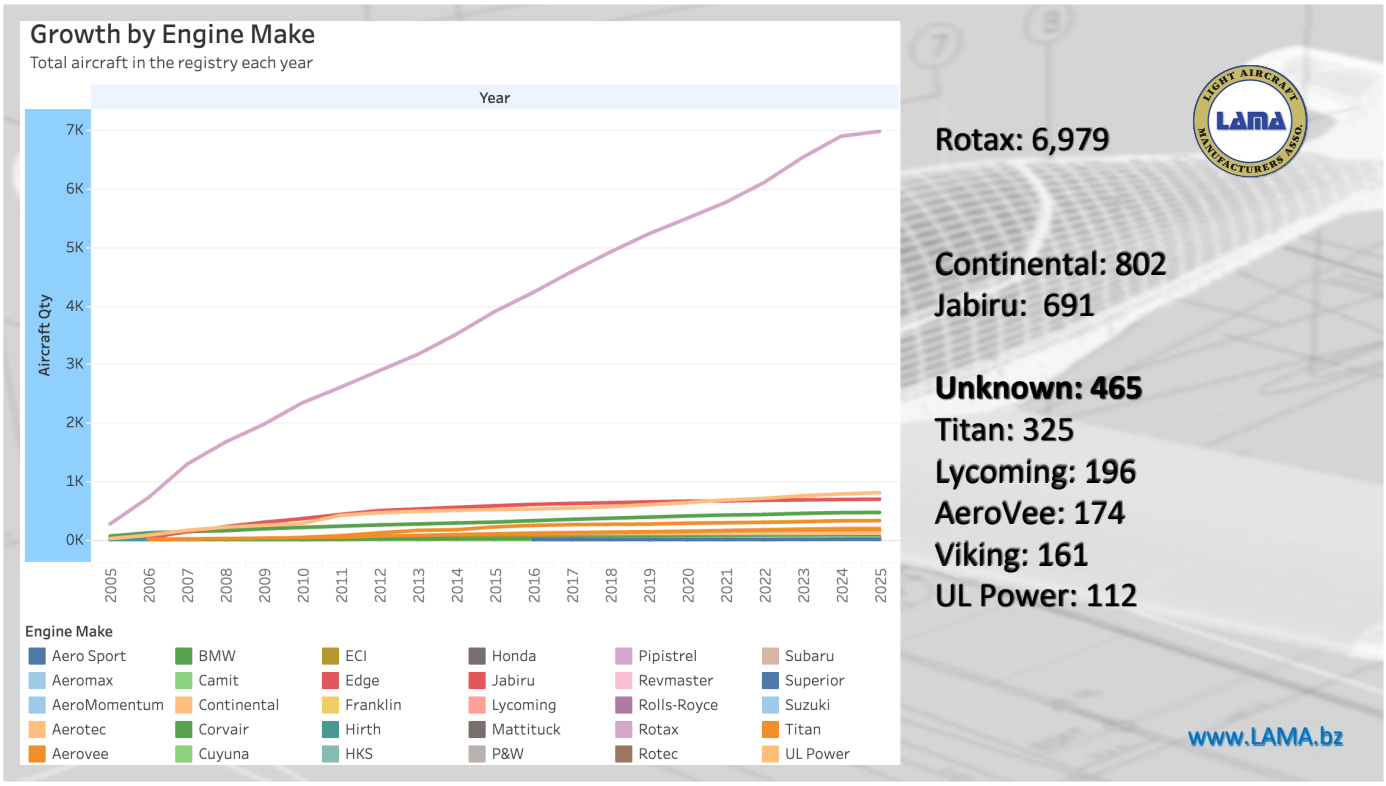
•Most OEMs have caught up on good part of their backlog
•New incoming orders are slower than hoped, mainly for the same reasons:

- Election years are often slower
- Unpredictable economy makes consumers nervous, and in turn, manufacturers
- Tariffs applied by US hurt especially all European OEMs (biggest part of OEMs) as well as Australia (Jabiru) and South Africa (Sling Aircraft), as a good part of their market is still the US
- Even engines imported from Europe and Australia are currently hit by 10% tarriff which ends up being added to the pricing
- Of course there are exceptions for some, but now rather few OEMs

•Human nature suggests expectations towards MOSAIC announcements play a role here

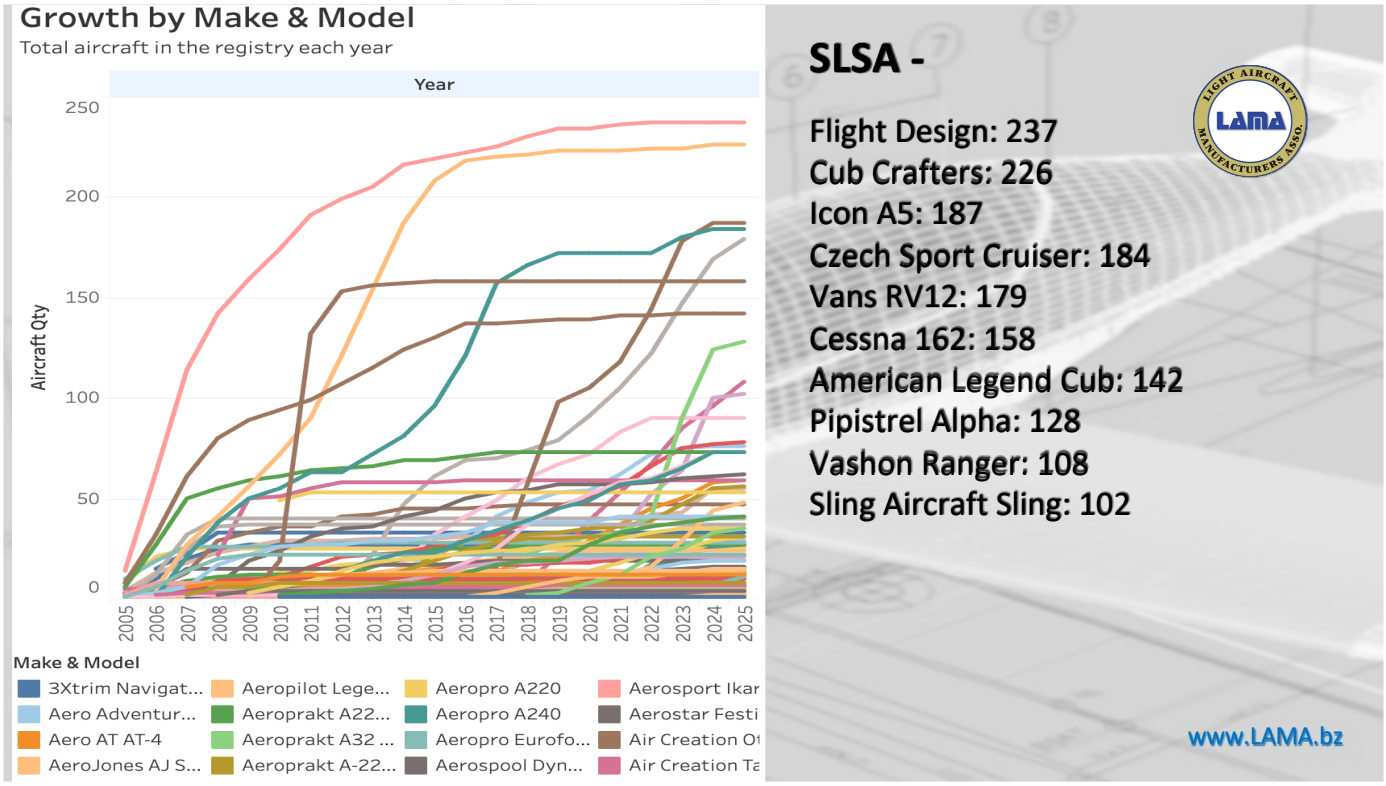
So there will be terrific opportunities to take advantage of: more speed, weight and terrific avionics that incorporate safety systems. Nothing is being taken away – just more options available, at greater cost. With all of this, I believe the current SLSA will retain their value as this is still a place to get new hardware with sophisticated avionics and low operating costs. Remember, the oldest LSA are only 20 years old!

So that is interesting airplane info, but WHAT ABOUT engine? Well, engines sales are tied to aircraft sales, though, as we have seen in the EAB world, there is a healthy diversification in the aircraft engine market.



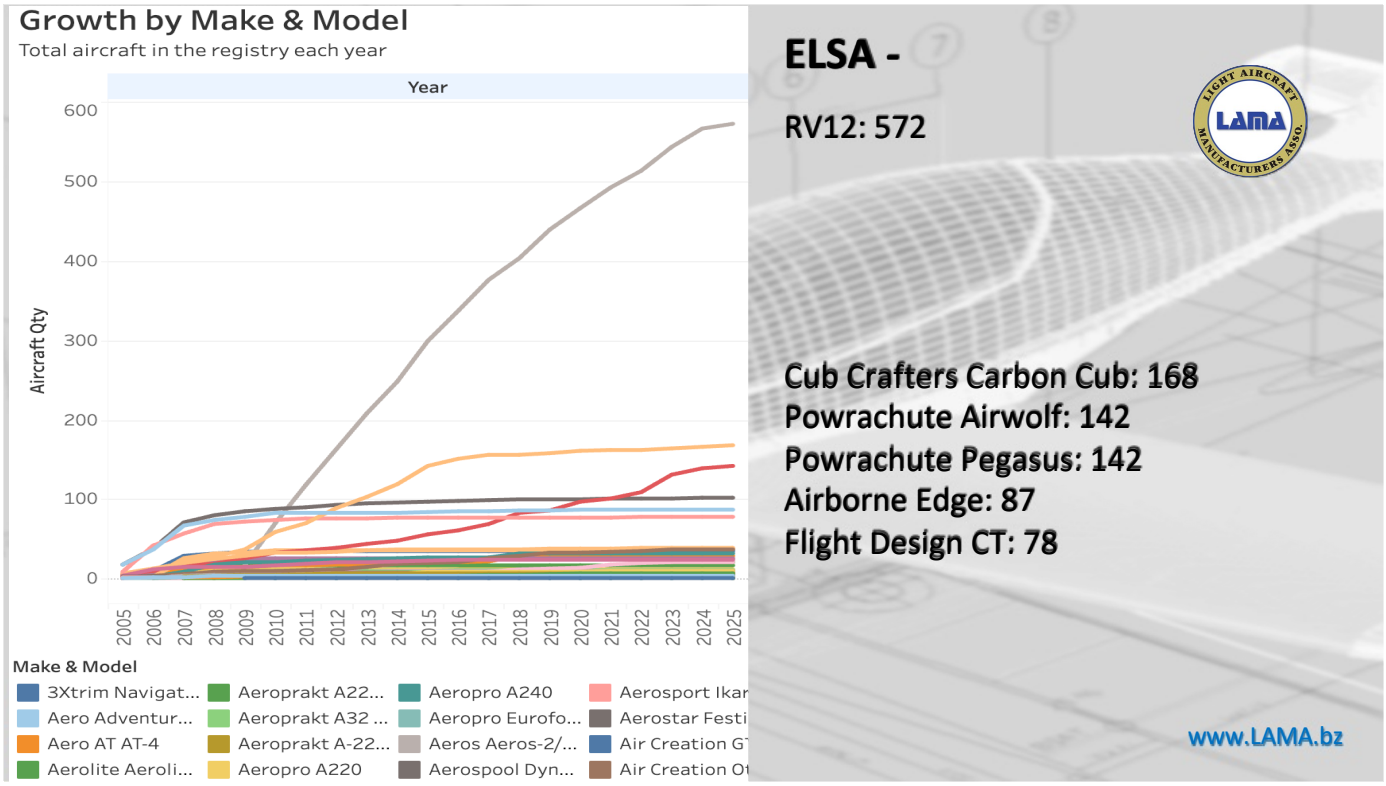
Here are engines – This has to be qualified as often the engine is not spelled out in the FAA database, – You see about 465 Unknowns, here.
What we can see is a lot of manufacturers in the market, clearly lead by Rotax.

Now let's look at Aircraft manufacturer and model growth

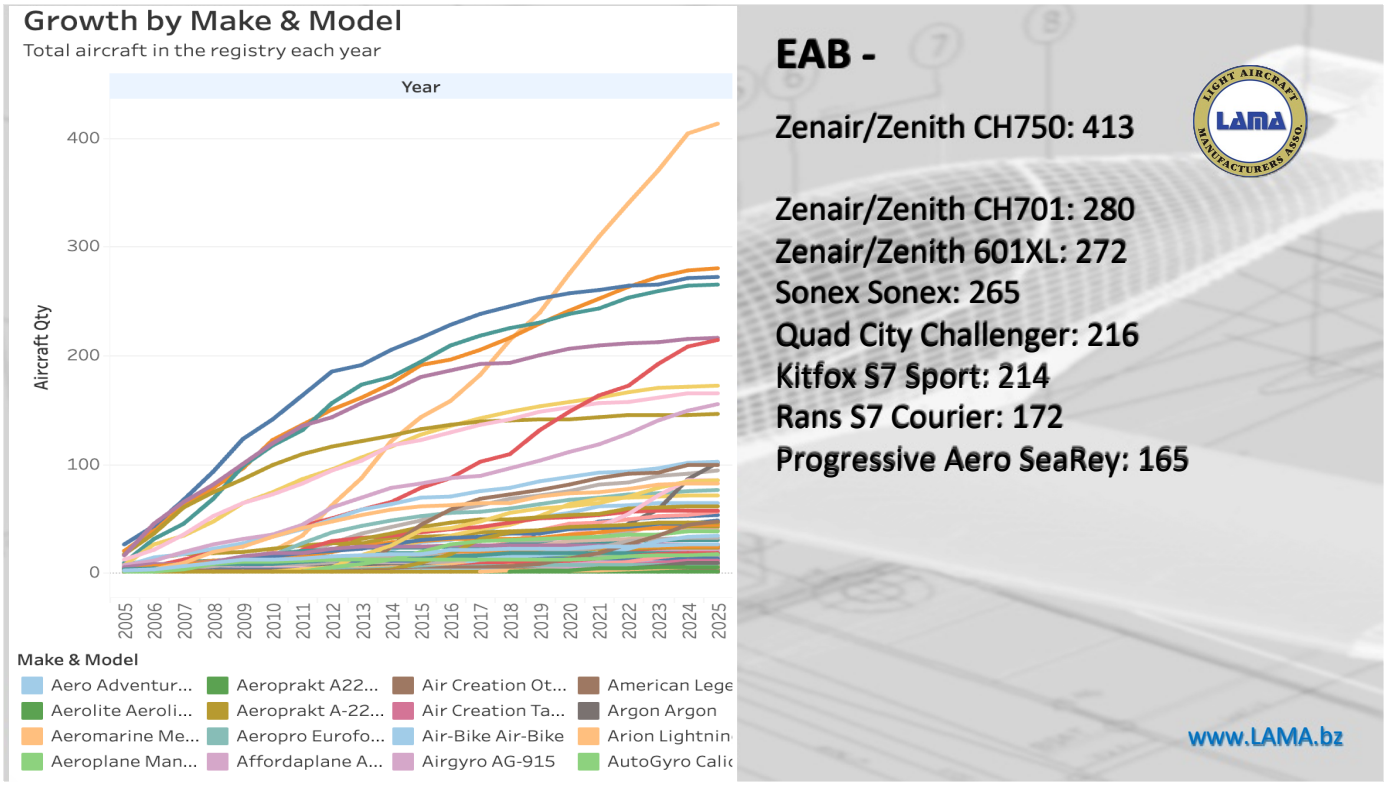


In the SLSA world, Flight Design continues to hold on to its historical lead on total registrations
The Carbon Cub, a decidedly different type of LSA has followed close behind.
With all the mis steps of Icon, 187 is not a figure to be embarrassed by.
And look at the historical and lasting impression from the SkyCatcher….that flat brown line in the center

Lets look at ELSA



I think its no surprise - Vans RV 12 is well in front of total ELSA registrations. And look at Powrachute – Powered Parachutes!
Carbon Cub comes in behind VAn's as many owners converted to ELSA
Speaking of conversions, Flight Design CT has quite a high number, especially since they have not been in the ELSA business. These are all conversions, primarily from owners not wanting to conform to Rotax's engine life limitation of 15 years. With CT being the first with the most since 2004, in 2019 the 15 year engine life limit started catching up.
Next up - EAB



Experimental Amateur Built is a different world. While there are many pilots, these are often craftsmen that enjoy building.
An SLSA or ELSA owner is often not a builder. For Builders: The fun, as they say, is in the journey.
As it is easier to manufacture a kit, there are many more kit purveyors than Ready to Fly manufacturers.

Lets look at recent trends in kits kits in a different way now.

Leading **Kit Built** Aircraft 2023 - 2025

Kit-built Aircraft

Number of registrations.

#	Make	Principal Model	2022	2023	2024	2025
Total				236	203	63
1	Rans	S-21 Outbound		22	30	20
2	Zenair/Zenith	CH750		42	47	12
3	Kitfox	S7 Sport		27	24	10
4	Just	Highlander		18	20	6
5	American Lege..	Legend Cub		8	10	3
	Vans	RV-12		6	2	3
7	Sonex	Sonex/Waiex/Xe..		11	8	2
8	Aeroplane Man..	Chinook Plus 2		1	0	1
	AutoGyro	MTO		10	9	1
	ELA	Eclipse		7	4	1
	Evolution	RevoLT		4	3	1

Kit-built Aircraft

Number of registrations .

#.	Make & Model	2022	2023	2024	2025
Total			236	203	63
1	Rans S-21 Outbound		13	28	15
2	Zenair/Zenith CH 750 STOL		30	34	9
3	Just Highlander		12	9	6
	Kitfox S7 Sport		20	16	6
5	American Legend Legend Cub		8	10	3
	Kitfox S1-S3		3	0	3
	Rans S-20 Raven		3	1	3
	Vans RV-12		6	2	3
9	Zenair/Zenith CH 701		9	6	2
10	Aeroplane Manufactory Chinook ..		1	0	1
	AutoGyro MTO		8	6	1

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This is annual registration for 2023,24 &25, so far. versus accumulated totals.
The chart on the left is for Manufacturer which will include all models by a Manufacturer.
The chart on the right counts specific Models.
And likely no surprise, Rans Aircraft is now leading the way, in large part because Randy's Outbound is inbound.

For Kit built planes, these are registrations, and some registrations occur near the time of sale, and some occur after the plane is completed. So these are not really annual sales numbers but do reflect what's been sold.

This data is good and descriptive, certainly when you understand the process, and this process provides the most accurate look into our industry.
This information is harvested by Steve Beste.

A "retired software engineer," Steve sifts through FAA computer records to distill the information LAMA reports on

Steve applies his technical skills to make the information consistent. His understanding of the industry helps reconcile the information, keeping it accurate and relevant.

These processes allow LAMA to display market information through a

program called Tableau Public

NOW lets look at Factory Built

Leading **Factory Built** Aircraft 2023-2025

Factory-built Aircraft

Number of registrations.

#	Make	Principal Model	2022	2023	2024	2025
Total				335	286	64
1	Vans	RV-12		55	45	16
2	Vashon	Ranger R7		18	11	12
3	Pipistrel	Sinus		67	54	6
4	Powrachute	Airwolf		31	11	5
5	Direct Fly	Alto		0	0	4
	Evektor	Harmony		13	15	4
7	Aeroprakt	A22LS Foxbat		6	11	3
	Evolution	RevoLT		3	5	3
9	CubCrafters	Carbon Cub		2	4	2
	Sling Aircraft	Sling		12	36	2

Factory-built Aircraft

Number of registrations .

#.	Make & Model	2022	2023	2024	2025
Total			335	286	64
1	Vans RV-12		55	45	16
2	Vashon Ranger R7		18	11	12
3	Direct Fly Alto		0	0	4
	Evektor Harmony		13	15	4
	Pipistrel Alpha		49	34	4
	Powrachute Airwolf		31	10	4
7	Evolution RevoLT		3	5	3
8	Aeroprakt A32 Vixxen		4	9	2
	CubCrafters Carbon Cub		2	4	2
	Sling Aircraft Sling		12	36	2

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Again, the last 2.5 years -Remember, Factory Built includes SLSA, ELSA, Exhibition, Primary Category and other.
Once again, the chart on the left is for Manufacturer which will include all models by a Manufacturer.
The chart on the right counts specific Models.
Sometimes on the left chart, there is a model listed for the manufacturer - That is just a placeholder for all the models for that manufacturer. - You can see that with Pipistrel.
But what manufacturers have the all time most kits and aircraft out there?

All-Time Leading **Kit Built** Aircraft

Kit-built Aircraft

Cumulative number of registrations since 2005

Rnk	Make	Principal Model	#
Total			**4,453**
1	Zenair/Zenith	CH750	1,030
2	Rans	S-21 Outbound	587
3	Sonex	Sonex/Waiex/Xen..	434
4	Kitfox	S7 Sport	415
5	Just	Highlander	319
6	Quad City	Challenger	216
7	AutoGyro	MTO	169
8	Progressive Aerody..	SeaRey	165
9	Magni	M-24 Orion	139
10	Vans	RV-12	94
11	Arion	Lightning LS-1	82
12	Quicksilver	MX	80
13	Kolb	Mark III	60
14	Silverlight	AR-1	53
15	American Legend	Legend Cub	47

Kit-built Aircraft

Cumulative number of registrations since 2005

Rnk	Make & Model	#
Total		**4,453**
1	Zenair/Zenith CH 750 STOL	413
2	Zenair/Zenith CH 701	280
3	Zenair/Zenith CH 601 XL Zodiac	272
4	Sonex Sonex	265
5	Quad City Challenger	216
6	Kitfox S7 Sport	214
7	Rans S-7 Courier	172
8	Progressive Aerodyne SeaRey	165
9	Just Highlander	155
10	Rans S-6 Coyote	146
11	Kitfox S4	102
12	Rans S-21 Outbound	101
13	Just Superstol	99
14	Vans RV-12	94
15	AutoGyro MTO	85

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And there you have it – Where we are today (July 6th, 2025) in terms of accumulated sales for Kit Built Aircraft Manufacturer on the left and and specific models on the right.
Of note is Zenith who occupies the first aggregate position on the left with 1,030 and top three slots with 3 different models on the right.

And for SLSA?

All-Time Leading **SLSA** Aircraft

All Aircraft

Cumulative number of registrations since 2005

Rnk	Make	Principal Model	#
Total			3,768
1	Flight Design	CT	253
2	Czech Aircraft Works	SportCruiser	241
3	Tecnam	P2008	232
4	CubCrafters	Carbon Cub	226
5	Pipistrel	Sinus	218
6	Icon	A5	187
7	Vans	RV-12	179
8	Cessna	162 Skycatcher	158
9	American Legend	Legend Cub	142
10	Aeropro	A240	130
11	Evektor	Harmony	121
12	Vashon	Ranger R7	108
13	Jabiru	J230-SP	105
14	Sling Aircraft	Sling	102
15	Remos	GX	99

All Aircraft

Cumulative number of registrations since 2005

Rnk	Make & Model	#
Total		3,768
1	Flight Design CT	237
2	CubCrafters Carbon Cub	226
3	Icon A5	187
4	Czech Aircraft Works SportCruiser	184
5	Vans RV-12	179
6	Cessna 162 Skycatcher	158
7	American Legend Legend Cub	142
8	Pipistrel Alpha	128
9	Vashon Ranger R7	108
10	Sling Aircraft Sling	102
11	Progressive Aerodyne SeaRey	90
12	Powrachute Airwolf	78
13	Tecnam P2008	76
14	Aeropro A240	73
	BRM Bristell	73

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This is where we are today in terms of accumulated sales for specifically SLSA Aircraft
Note the difference between Manufacturer on the left, and specific models on the right.
As you saw in the earlier graph, CT is on top of both sides – The numbers may be different because manufacturers may have other models.
#3 Tecnam on the left side is called just P2008, but they manufacture several models.

And for Factory built

All-Time Leading **Factory Built** Aircraft

Factory-built Aircraft

Cumulative number of registrations since 2005

Rnk	Make	Principal Model	#
Total			5,873
1	Vans	RV-12	753
2	CubCrafters	Carbon Cub	394
3	Powrachute	Airwolf	361
4	Flight Design	CT	332
5	Pipistrel	Sinus	302
6	Czech Aircraft Works	SportCruiser	282
7	Tecnam	P2008	248
8	Icon	A5	197
9	American Legend	Legend Cub	182
10	Cessna	162 Skycatcher	166
11	Aeropro	A240	147
12	Airborne	Edge	128
13	Evektor	Harmony	125
14	Jabiru	J230-SP	121
15	Vashon	Ranger R7	109

Factory-built Aircraft

Cumulative number of registrations since 2005

Rnk	Make & Model	#
Total		5,873
1	Vans RV-12	753
2	CubCrafters Carbon Cub	394
3	Flight Design CT	315
4	Powrachute Airwolf	220
5	Czech Aircraft Works SportCruiser	216
6	Icon A5	197
7	American Legend Legend Cub	182
8	Cessna 162 Skycatcher	166
9	Pipistrel Alpha	133
10	Airborne Edge/Redback	128
11	Powrachute Pegasus	113
12	Vashon Ranger R7	109
13	Sling Aircraft Sling	104
14	Progressive Aerodyne SeaRey	100
15	BRM Bristell	96

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Here is Factory Built Aircraft. Remember, this includes SLSA, ELSA, Exhibition, Primary Category and other. As opposed to just showing the top 3, I've presented a wider view. I wish I had time to get into many of the reasons for the fluctuations – they are often fascinating and surprising!!

I will be providing more in depth analysis in the future for LAMA and this will be accessible on the LAMA website.

Lets turn our attention to New Light Sport Aircraft- MOSAIC!