

## **Helicopters Market by Point of Sale, OEM-by Component & System, Type, Application (Military, Civil and Commercial), Number of Engines (Twin Engines, Single Engines) and Region; Aftermarket - by Component & System and Region- Global Forecast to 2027**

Market Report | 2022-09-12 | 300 pages | MarketsandMarkets

### **AVAILABLE LICENSES:**

- Single User \$4950.00
- Multi User \$6650.00
- Corporate License \$8150.00
- Enterprise Site License \$10000.00

### **Report description:**

The helicopters market size is expected to grow from USD 30.6 billion in 2022 to USD 41.2 billion by 2027, at a CAGR of 6.1% during the forecast period. The market for helicopters is driven by various factors, such as the increasing demand for lightweight helicopters and replacement of aging military helicopters. However, delivery backlogs by major OEMs are limiting the overall growth of the market.

The OEM segment of point of sale is estimated to register the highest CAGR of the helicopters market from 2022 to 2027.

Based on point of sale, the OEM segment of the helicopters market is estimated to register highest CAGR from 2022 to 2027. High demand for helicopters from commercial and military verticals is driving the growth of OEM segment of helicopters market. The development of next-generation helicopters is another significant factor driving the growth of the OEM market.

The civil & commercial type of helicopters is estimated to account for the largest share of the helicopters market in 2022.

Based on type, the civil & commercial segment is estimated to account for the largest share of the helicopters market in 2022. In recent years, the demand for passenger transport, utility missions, and corporate transport has increased significantly. Additionally, the demand for emergency medical services is increasing by the medical support & services sector. These are the driving factors that are leading to the increasing adoption of civil & commercial helicopters of the helicopters market.

**Scotts International. EU Vat number: PL 6772247784**

tel. 0048 603 394 346 e-mail: [support@scotts-international.com](mailto:support@scotts-international.com)

[www.scotts-international.com](http://www.scotts-international.com)

North America is estimated to account for the largest share of the helicopters market in 2022

North America is estimated to account for the largest share of the helicopters market in 2022. The aviation and aerospace sectors in the region are growing steadily. This has consequently created a significant demand for helicopters. The growth of the helicopters market in this region is driven by factors such as the increased use of helicopters in the defense sector, largest helicopter fleet size, and the presence of major OEMs.

Break-up of profiles of primary participants in the helicopters market

- By Company Type: Tier 1 - 40%, Tier 2 - 40%, and Tier 3 - 20%
- By Designation: C-Level Executives- 20%, Director Level - 20%, Others- 60%
- By Region: North America -30%, Europe - 10%, AsiaPacific - 50%,Rest of the World□- 10%

Key players in the helicopters market are Airbus Helicopters SAS (France), Bell Helicopters (US), The Boeing Company (US), Leonardo S.p.A. (Italy), Lockheed Martin Corporation (US), Russian Helicopters, JSC (Russia), and Kawasaki Heavy Industries (Japan), among others. These companies provide helicopters in various countries across North America, Europe, Asia Pacific, Latin America and Middle East & Africa.

Research Coverage:

The market study covers the helicopters market across segments. It aims at estimating the market size and growth potential of this market across various segments, such as point of sale, OEM-by component & system, type, application, number of engines, and region, after market-by component & system, and region. The study also includes an in-depth competitive analysis of the key players in the market, along with their company profiles, key observations related to product and business offerings, recent developments, and key market strategies.

Reasons to buy this report:

The report will help market leaders/new entrants in this market with information on the closest approximations of the revenue numbers for the overall helicopters market and its subsegments. This report covers the entire ecosystem of the helicopters, and disruptive technologies, such as enhanced flight vision systems (EFVS), autonomous helicopters and hybrid-electric propulsion. This report will help stakeholders understand the competitive landscape and gain more insights to better position their businesses and plan suitable go-to-market strategies. The report will also help stakeholders understand the pulse of the market and provide them with information on key market drivers, restraints, challenges, and opportunities.

The report provides insights on the following pointers:

- Market Penetration: Comprehensive information on helicopters offered by top players in the market
- Product Development/Innovation: Detailed insights on upcoming technologies, research & development activities, and new product launches in the helicopters market
- Market Development: Comprehensive information about lucrative markets - the report analyzes the helicopters market across varied regions
- Market Diversification: Exhaustive information about new products, untapped geographies, recent developments, and investments in the helicopters market
- Competitive Assessment: In-depth assessment of market shares, growth strategies, products, and manufacturing capabilities of

**Scotts International. EU Vat number: PL 6772247784**

tel. 0048 603 394 346 e-mail: [support@scotts-international.com](mailto:support@scotts-international.com)

[www.scotts-international.com](http://www.scotts-international.com)

leading players in the helicopters market

## Table of Contents:

1	INTRODUCTION	49
1.1	STUDY OBJECTIVES	49
1.2	MARKET DEFINITION AND SCOPE	49
1.3	STUDY SCOPE	50
1.3.1	HELICOPTERS MARKET SEGMENTATION	50
1.3.2	REGIONAL SCOPE	51
1.3.2.1	OEM regional scope	51
1.3.2.2	Aftermarket regional scope	51
1.3.3	YEARS CONSIDERED	52
1.4	CURRENCY CONSIDERED	52
1.4.1	USD EXCHANGE RATES	52
1.5	INCLUSIONS AND EXCLUSIONS	52
TABLE 1 HELICOPTERS MARKET: INCLUSIONS AND EXCLUSIONS		52
1.6	LIMITATIONS	53
1.7	MARKET STAKEHOLDERS	53
1.8	SUMMARY OF CHANGES	53
2	RESEARCH METHODOLOGY	54
2.1	RESEARCH DATA	54
FIGURE 1 RESEARCH FLOW		54
FIGURE 2 RESEARCH DESIGN		55
2.1.1	SECONDARY DATA	55
2.1.1.1	Secondary sources	56
2.1.2	PRIMARY DATA	56
2.1.2.1	Primary sources	57
2.1.2.2	Breakdown of Primaries: By Company Type, Designation, and Region	57
2.2	FACTOR ANALYSIS	58
2.2.1	INTRODUCTION	58
2.2.2	DEMAND-SIDE INDICATORS	58
2.2.3	SUPPLY-SIDE INDICATORS	58
2.3	MARKET SIZE ESTIMATION	59
2.3.1	BOTTOM-UP APPROACH	59
2.3.1.1	OEM helicopters market	59
2.3.1.2	Aftermarket helicopters market	59
2.3.1.2.1	Part replacement market	59
FIGURE 3 MARKET SIZE ESTIMATION: BOTTOM-UP APPROACH		60
2.3.2	TOP-DOWN APPROACH	60
2.3.2.1	Aftermarket helicopters market, by region and country	60
2.3.2.2	Helicopter OEM market, by application	60
FIGURE 4 MARKET SIZE ESTIMATION: TOP-DOWN APPROACH		60
2.4	MARKET BREAKDOWN AND DATA TRIANGULATION	61
FIGURE 5 DATA TRIANGULATION METHODOLOGY		61
2.5	ASSUMPTIONS	62
2.6	RISK ANALYSIS	62
3	EXECUTIVE SUMMARY	63

**Scotts International. EU Vat number: PL 6772247784**

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

FIGURE 6	OEM SEGMENT TO LEAD MARKET DURING FORECAST PERIOD	63
FIGURE 7	CIVIL & COMMERCIAL SEGMENT PROJECTED TO DOMINATE MARKET IN 2022	64
FIGURE 8	TWIN ENGINE HELICOPTERS TO LEAD MARKET DURING FORECAST PERIOD	64
FIGURE 9	NORTH AMERICA TO ACCOUNT FOR LARGEST SHARE OF OEM HELICOPTERS MARKET IN 2022	65
4	PREMIUM INSIGHTS	66
4.1	HELICOPTERS MARKET, 2022-2027	66
FIGURE 10	INCREASING DEMAND FOR LIGHTWEIGHT HELICOPTERS TO DRIVE MARKET	66
4.2	HELICOPTERS OEM MARKET, BY TYPE	66
FIGURE 11	CIVIL & COMMERCIAL SEGMENT TO LEAD HELICOPTERS MARKET IN 2022	66
4.3	HELICOPTERS AFTERMARKET, BY COMPONENT & SYSTEM	67
FIGURE 12	ACTUATORS SEGMENT EXPECTED TO REGISTER HIGHEST CAGR	67
4.4	HELICOPTERS OEM MARKET, BY COUNTRY	67
FIGURE 13	ITALY TO HOLD HIGHEST CAGR DURING FORECAST PERIOD	67
5	MARKET OVERVIEW	68
5.1	INTRODUCTION	68
5.2	MARKET DYNAMICS	69
FIGURE 14	HELICOPTERS MARKET: DRIVERS, RESTRAINTS, OPPORTUNITIES, AND CHALLENGES	69
5.2.1	DRIVERS	69
5.2.1.1	Rescue operations in civil applications	69
5.2.1.2	Increasing demand for lightweight helicopters	70
5.2.1.3	Replacement of aging military helicopters	70
TABLE 2	MILITARY EXPENDITURE BY EMERGING ECONOMIES, 2017-2021 (USD BILLION)	70
5.2.2	RESTRAINTS	70
5.2.2.1	Delivery backlogs by major OEMs	70
5.2.3	OPPORTUNITIES	71
5.2.3.1	Commercialization of UAM and eVTOL	71
5.2.3.2	Hybrid-electric propulsion technology	71
5.2.3.3	Scope for helicopters aftermarket	71
5.2.3.4	Fuel-efficient turboshaft engines	72
5.2.4	CHALLENGES	72
5.2.4.1	High cost of helicopter components	72
5.2.4.2	Stringent regulatory and complex product certification procedure	72
5.2.4.3	Rising fuel prices	73
FIGURE 15	JET FUEL PRICE TREND FROM JUNE 2021-JUNE 2022	73
5.3	TRENDS/DISRUPTIONS IMPACTING CUSTOMER BUSINESS	74
5.3.1	REVENUE SHIFT AND NEW REVENUE POCKETS	74
FIGURE 16	REVENUE SHIFT IN HELICOPTERS MARKET	74
5.4	HELICOPTERS MARKET ECOSYSTEM	74
5.4.1	PROMINENT COMPANIES	74
5.4.2	STARTUPS AND SMALL ENTERPRISES	74
5.4.3	END USERS	75
5.4.4	AFTERMARKET	75
FIGURE 17	HELICOPTERS MARKET ECOSYSTEM MAP	75
TABLE 3	HELICOPTERS MARKET ECOSYSTEM	75
5.5	TECHNOLOGY ANALYSIS	76
5.5.1	SINGLE ENGINE OPERATIVE MODE	76
5.5.2	URBAN AIR MOBILITY	77

5.6	USE CASE ANALYSIS	77
5.6.1	USE CASE: ENHANCE PERFORMANCE OF HELICOPTERS USING CIVIL TILT ROTOR CONCEPT	77
TABLE 4	APPLICATION OF CIVIL TILT ROTOR CONCEPT	77
5.6.2	USE CASE: VARIABLE-SWEEP MAIN ROTOR BLADES	78
TABLE 5	PROBLEMS ASSOCIATED WITH HELICOPTER BLADE OPTIMIZATION	78
5.7	VALUE CHAIN ANALYSIS OF HELICOPTERS MARKET	78
FIGURE 18	VALUE CHAIN ANALYSIS	78
5.8	PRICING ANALYSIS	79
FIGURE 19	AVERAGE SELLING PRICE (USD MILLION)	79
5.9	OPERATIONAL/VOLUME DATA	79
TABLE 6	HELICOPTERS MARKET, BY APPLICATION (2018-2021) (UNITS)	79
5.10	PORTER'S FIVE FORCES ANALYSIS	80
TABLE 7	HELICOPTERS MARKET: PORTER'S FIVE FORCE ANALYSIS	80
FIGURE 20	HELICOPTERS MARKET: PORTER'S FIVE FORCE ANALYSIS	80
5.10.1	THREAT OF NEW ENTRANTS	80
5.10.2	THREAT OF SUBSTITUTES	81
5.10.3	BARGAINING POWER OF SUPPLIERS	81
5.10.4	BARGAINING POWER OF BUYERS	81
5.10.5	INTENSITY OF COMPETITIVE RIVALRY	82
5.11	KEY STAKEHOLDERS AND BUYING CRITERIA	82
5.11.1	KEY STAKEHOLDERS IN BUYING PROCESS	82
FIGURE 21	INFLUENCE OF STAKEHOLDERS IN BUYING PROCESS FOR TOP TWO SOLUTIONS	82
TABLE 8	INFLUENCE OF STAKEHOLDERS IN BUYING PROCESS FOR TOP TWO SOLUTIONS (%)	82
5.11.2	BUYING CRITERIA	83
FIGURE 22	KEY BUYING CRITERIA FOR TOP TWO APPLICATIONS	83
TABLE 9	KEY BUYING CRITERIA FOR TOP TWO APPLICATIONS	83
5.12	TARIFF AND REGULATORY LANDSCAPE	83
5.12.1	REGULATORY BODIES, GOVERNMENT AGENCIES, AND OTHER ORGANIZATIONS	83
TABLE 10	NORTH AMERICA: LIST OF REGULATORY BODIES, GOVERNMENT AGENCIES, AND OTHER ORGANIZATIONS	84
TABLE 11	EUROPE: LIST OF REGULATORY BODIES, GOVERNMENT AGENCIES, AND OTHER ORGANIZATIONS	84
TABLE 12	ASIA PACIFIC: LIST OF REGULATORY BODIES, GOVERNMENT AGENCIES, AND OTHER ORGANIZATIONS	85
TABLE 13	MIDDLE EAST & AFRICA: LIST OF REGULATORY BODIES, GOVERNMENT AGENCIES, AND OTHER ORGANIZATIONS	85
TABLE 14	LATIN AMERICA: LIST OF REGULATORY BODIES, GOVERNMENT AGENCIES, AND OTHER ORGANIZATIONS	85
5.13	TRADE DATA ANALYSIS	86
TABLE 15	COUNTRY-WISE IMPORTS, 2020-2021 (USD THOUSAND)	86
TABLE 16	COUNTRY-WISE EXPORTS, 2020-2021 (USD THOUSAND)	87
5.14	KEY CONFERENCES AND EVENTS IN 2022-2023	87
TABLE 17	HELICOPTERS MARKET: CONFERENCES AND EVENTS	87
6	INDUSTRY TRENDS	89
6.1	INTRODUCTION	89
6.2	TECHNOLOGY TRENDS	89
6.2.1	HYBRID-ELECTRIC PROPULSION	89
6.2.2	AUTONOMOUS TECHNOLOGY	90
6.2.2.1	Artificial Intelligence (AI)	90
6.2.2.2	Big data analytics	90
6.2.2.3	Internet of Things (IoT)	91
6.2.2.4	Fly-by-wire	91

6.2.3	ENHANCED FLIGHT VISION SYSTEMS (EFVS) FOR HELIPORTS	91
6.2.4	MULTIROLE COMBAT HELICOPTERS WITH INTEGRATED AVIONICS AND WEAPONS	91
6.2.5	ULTRA-LIGHT MULTI-MODE RADAR	91
6.2.6	ADVANCED HELICOPTER COCKPIT AVIONICS SYSTEM (AHCAS)	92
6.3	SUPPLY CHAIN ANALYSIS	92
FIGURE 23	SUPPLY CHAIN ANALYSIS	93
6.4	IMPACT OF MEGATRENDS	93
6.4.1	IMPLEMENTATION OF SUSTAINABILITY	93
6.4.2	ALTERNATE POWER SOURCES	93
6.4.3	ACCELERATING URBANIZATION	94
6.4.4	DIGITIZATION	94
6.5	INNOVATION AND PATENT REGISTRATIONS	94
TABLE 18	INNOVATION AND PATENT REGISTRATIONS (2019- 2022)	94
7	HELICOPTERS MARKET, BY POINT OF SALE	96
7.1	INTRODUCTION	97
FIGURE 24	OEM SEGMENT PROJECTED TO LEAD MARKET FROM 2022 TO 2027	97
TABLE 19	HELICOPTERS MARKET, BY POINT OF SALE, 2019-2021 (USD MILLION)	97
TABLE 20	HELICOPTERS MARKET, BY POINT OF SALE, 2022-2027 (USD MILLION)	97
7.2	OEM	98
7.3	AFTERMARKET	98
8	HELICOPTERS OEM MARKET, BY TYPE	99
8.1	INTRODUCTION	100
FIGURE 25	MILITARY SEGMENT TO REGISTER HIGHEST CAGR FROM 2022 TO 2027	100
TABLE 21	HELICOPTERS OEM MARKET, BY TYPE, 2019-2021 (USD MILLION)	100
TABLE 22	HELICOPTERS OEM MARKET, BY TYPE, 2022-2027 (USD MILLION)	100
8.2	MILITARY	101
TABLE 23	MILITARY HELICOPTERS OEM MARKET SIZE, BY WEIGHT, 2019-2021 (USD MILLION)	101
TABLE 24	MILITARY HELICOPTERS OEM MARKET SIZE, BY WEIGHT, 2022-2027 (USD MILLION)	101
8.2.1	LIGHT HELICOPTERS (<4.5 TONS)	102
8.2.1.1	Demand for rescue & search operations	102
8.2.2	MEDIUM HELICOPTERS (4.5-8.5 TONS)	102
8.2.2.1	Higher operational range attracts military clients	102
8.2.3	HEAVY HELICOPTERS (>8.5 TONS)	102
8.2.3.1	Demand for transport of heavy combat vehicles	102
8.3	CIVIL & COMMERCIAL	102
TABLE 25	CIVIL & COMMERCIAL HELICOPTERS OEM MARKET, BY WEIGHT, 2019-2021 (USD MILLION)	103
TABLE 26	CIVIL & COMMERCIAL HELICOPTERS OEM MARKET, BY WEIGHT, 2022-2027 (USD MILLION)	103
8.3.1	LIGHT HELICOPTERS (<3.1 TONS)	103
8.3.1.1	Demand for short-haul travel contributes to segment growth	103
8.3.2	MEDIUM HELICOPTERS (3.1-9.0 TONS)	104
8.3.2.1	Demanded by corporate individuals	104
8.3.3	HEAVY HELICOPTERS (>9.0 TONS)	104
8.3.3.1	Eases cargo transportation	104
9	HELICOPTERS OEM MARKET, BY APPLICATION	105
9.1	INTRODUCTION	106
FIGURE 26	CIVIL & COMMERCIAL SEGMENT TO LEAD MARKET DURING FORECAST PERIOD	106
TABLE 27	HELICOPTERS OEM MARKET, BY APPLICATION, 2019-2021 (USD MILLION)	106

TABLE 28 HELICOPTERS OEM MARKET SIZE, BY APPLICATION, 2022-2027 (USD MILLION) 107

9.2 CIVIL & COMMERCIAL 107

TABLE 29 CIVIL & COMMERCIAL HELICOPTERS OEM MARKET, BY APPLICATION, 2019-2021 (USD MILLION) 107

TABLE 30 CIVIL & COMMERCIAL HELICOPTERS OEM MARKET SIZE, BY APPLICATION, 2022-2027 (USD MILLION) 108

9.2.1 TRANSPORT HELICOPTERS 108

9.2.1.1 Enables quick transportation 108

9.2.2 EMERGENCY RESCUE & MEDICAL SUPPORT HELICOPTERS 108

9.2.2.1 Provides instant assistance during natural calamities 108

9.2.3 CIVIL UTILITY HELICOPTERS 108

9.2.3.1 Increased applications in construction sites 108

9.2.4 OFFSHORE HELICOPTERS 109

9.2.4.1 Hovering, take off, and landing capabilities 109

9.3 MILITARY 109

TABLE 31 MILITARY HELICOPTERS OEM MARKET, BY APPLICATION, 2019-2021 (USD MILLION) 109

TABLE 32 MILITARY HELICOPTERS OEM MARKET SIZE, BY APPLICATION, 2022-2027 (USD MILLION) 109

9.3.1 ATTACK & RECONNAISSANCE HELICOPTERS 110

9.3.1.1 Increased demand by military to conduct combat missions 110

9.3.2 MARITIME HELICOPTERS 110

9.3.2.1 Serves offshore platforms 110

9.3.3 TRANSPORT HELICOPTERS 110

9.3.3.1 Adoption by military to conduct defense missions 110

9.3.4 SEARCH & RESCUE HELICOPTERS 110

9.3.4.1 Demand for medical support to drive segment 110

9.3.5 TRAINING HELICOPTERS 111

9.3.5.1 Used by defense to train soldiers 111

10 HELICOPTERS OEM MARKET, BY COMPONENT & SYSTEM 112

10.1 INTRODUCTION 113

FIGURE 27 ENGINES SEGMENT PROJECTED TO LEAD MARKET FROM 2022 TO 2027 113

TABLE 33 HELICOPTERS OEM MARKET, BY COMPONENT & SYSTEM, 2019-2021 (USD MILLION) 113

TABLE 34 HELICOPTERS OEM MARKET, BY COMPONENT & SYSTEM, 2022-2027 (USD MILLION) 113

10.2 AIRFRAMES 114

TABLE 35 OEM: HELICOPTER AIRFRAMES MARKET, BY COMPONENT & SYSTEM, 2019-2021 (USD MILLION) 114

TABLE 36 OEM: HELICOPTER AIRFRAMES MARKET SIZE, BY COMPONENT & SYSTEM, 2022-2027 (USD MILLION) 115

10.2.1 AEROSTRUCTURES 115

TABLE 37 HELICOPTER AEROSTRUCTURES OEM MARKET SIZE, BY COMPONENT, 2019-2021 (USD MILLION) 116

TABLE 38 HELICOPTER AEROSTRUCTURES OEM MARKET SIZE, BY COMPONENT, 2022-2027 (USD MILLION) 116

10.2.1.1 Windows 116

10.2.1.1.1 Allows clear aerial visibility 116

10.2.1.2 Windshields 116

10.2.1.2.1 Advancements in aerospace materials aid development of high-strength windshields 116

10.2.2 MAIN ROTOR SYSTEMS 117

TABLE 39 HELICOPTER MAIN ROTOR SYSTEMS OEM MARKET SIZE, BY COMPONENT, 2019-2021 (USD MILLION) 117

TABLE 40 HELICOPTER MAIN ROTOR SYSTEMS OEM MARKET SIZE, BY COMPONENT, 2022-2027 (USD MILLION) 117

10.2.2.1 Rotor blades 117

10.2.2.1.1 Advancements in rotor blade material 117

10.2.3 ANTI-TORQUE SYSTEMS 117

TABLE 41 HELICOPTER ANTI-TORQUE SYSTEMS OEM MARKET SIZE, BY COMPONENT, 2019-2021 (USD MILLION) 118

**Scotts International. EU Vat number: PL 6772247784**

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

TABLE 42□HELICOPTER ANTI-TORQUE SYSTEMS OEM MARKET SIZE, BY COMPONENT, 2022-2027 (USD MILLION)□118

10.2.3.1□Anti-torque blades□118

10.2.3.1.1□Enables landing helicopters□118

10.2.4□TRANSMISSION SYSTEMS□118

TABLE 43□HELICOPTER TRANSMISSION SYSTEMS OEM MARKET, BY COMPONENT, 2019-2021 (USD MILLION)□118

TABLE 44□HELICOPTER TRANSMISSION SYSTEMS OEM MARKET, BY COMPONENT, 2022-2027 (USD MILLION)□119

10.2.4.1□Reduction gearboxes□119

10.2.4.1.1□Wide application in engines□119

10.2.4.2□Turbine filters□119

10.2.4.2.1□Enhances turbine performance□119

10.2.5□ELECTRICAL SYSTEMS□119

10.2.5.1□Significant investment for advancements□119

10.2.6□AVIONICS□120

10.2.6.1□Regular upgrades in avionics□120

10.2.7□HYDRAULIC SYSTEMS□120

10.2.7.1□Additional control power for heavier helicopters□120

10.2.8□UNDERCARRIAGES□120

10.2.8.1□Increase in defense budgets by developed countries□120

10.2.9□STABILITY AUGMENTATION SYSTEMS□120

10.2.9.1□Ideal for search & rescue operations□120

10.2.10□ENVIRONMENTAL CONTROL SYSTEMS□120

10.2.10.1□Helpful for helicopters operating at high altitudes□120

10.2.11□FLIGHT CONTROL SYSTEMS□121

10.2.11.1□Significant opportunities for flight control systems□121

10.2.12□EMERGENCY SYSTEMS□121

10.2.12.1□Critical aspect for protecting helicopters from capsizing□121

TABLE 45□HELICOPTER EMERGENCY SYSTEMS OEM MARKET, BY COMPONENT, 2019-2021 (USD MILLION)□121

TABLE 46□HELICOPTER EMERGENCY SYSTEMS OEM MARKET, BY COMPONENT, 2022-2027 (USD MILLION)□121

10.2.12.2□Flotation systems□122

10.2.12.2.1□Demanded by commercial and military helicopters□122

10.2.12.3□Egress lighting□122

10.2.12.3.1□Advancements in emergency lighting□122

10.2.13□SPECIAL PURPOSE SYSTEMS□122

TABLE 47□HELICOPTER SPECIAL PURPOSE SYSTEMS OEM MARKET, BY COMPONENT, 2019-2021 (USD MILLION)□122

TABLE 48□HELICOPTER SPECIAL PURPOSE SYSTEMS OEM MARKET, BY COMPONENT, 2022-2027 (USD MILLION)□122

10.2.13.1□Emergency medical systems□123

10.2.13.1.1□Demand from medical sector□123

10.2.13.2□Combat systems□123

10.2.13.2.1□Used in military applications□123

10.2.13.3□Flight rescue systems□123

10.2.13.3.1□Used in emergency rescue missions□123

10.2.14□CABIN INTERIORS□123

TABLE 49□HELICOPTER CABIN INTERIORS OEM MARKET, BY COMPONENT, 2019-2021 (USD MILLION)□123

TABLE 50□HELICOPTER CABIN INTERIORS OEM MARKET SIZE, BY COMPONENT, 2022-2027 (USD MILLION)□123

10.2.14.1□Interior lights□124

10.2.14.1.1□Upgrade of lighting solutions□124

10.2.14.2□Seats□124

**Scotts International. EU Vat number: PL 6772247784**

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com



- 10.2.14.2.1 Increase in helicopter fleet to drive segment growth 124
- 10.3 ENGINES 124
- 11 HELICOPTERS OEM MARKET, BY NUMBER OF ENGINES 125
- 11.1 INTRODUCTION 126
- FIGURE 28 TWIN ENGINES TO HAVE HIGHER MARKET SHARE FROM 2022 TO 2027 126
- TABLE 51 HELICOPTERS OEM MARKET, BY NUMBER OF ENGINES, 2019-2021 (USD MILLION) 126
- TABLE 52 HELICOPTERS OEM MARKET, BY NUMBER OF ENGINES, 2022-2027 (USD MILLION) 126
- 11.2 TWIN ENGINES 127
- 11.2.1 MORE RELIABLE 127
- 11.3 SINGLE ENGINES 127
- 11.3.1 NOISELESS AND LIGHTWEIGHT 127
- 12 HELICOPTERS AFTERMARKET, BY COMPONENT & SYSTEM 128
- 12.1 INTRODUCTION 129
- FIGURE 29 ACTUATORS SEGMENT PROJECTED TO LEAD MARKET FROM 2022 TO 2027 129
- TABLE 53 HELICOPTERS AFTERMARKET, BY COMPONENT & SYSTEM, 2019-2021 (USD MILLION) 130
- TABLE 54 HELICOPTERS AFTERMARKET, BY COMPONENT & SYSTEM, 2022-2027 (USD MILLION) 130
- 12.2 MAIN ROTOR SYSTEMS 131
- 12.2.1 MAIN ROTOR BLADES 131
- 12.2.1.1 Unique design promotes adoption 131
- 12.2.2 TAIL ROTOR BLADES 131
- 12.2.2.1 Extensive adoption in helicopters 131
- 12.3 AVIONICS 131
- 12.3.1 ADS-B 131
- 12.3.1.1 Broadcasts real-time position 131
- 12.4 LANDING GEAR SYSTEMS 132
- 12.4.1 SKIDS & BEAR PAWS 132
- 12.4.1.1 Performs safe landing 132
- 12.4.2 TIRES 132
- 12.4.2.1 Replacement of old tires to drive segment 132
- 12.5 EMERGENCY SYSTEMS 132
- 12.5.1 LIFE VESTS, FLOATS, LIFE RAFTS 132
- 12.5.1.1 Equips helicopters with evacuation systems 132
- 12.6 AEROSTRUCTURES 133
- 12.6.1 WINDOWS AND WINDSHIELDS 133
- 12.6.1.1 Frequent replacement 133
- 12.6.2 DOORS 133
- 12.6.2.1 Rise in helicopter use to lead to increase in demand 133
- 12.7 CABIN INTERIORS 133
- 12.7.1 LIGHTS 133
- 12.7.1.1 Lower life span 133
- 12.7.2 SEATS 133
- 12.7.2.1 Upgrade of seats to drive segment 133
- 12.7.3 NOISE REDUCTION SYSTEMS 134
- 12.7.3.1 Reduces noise in helicopters 134
- 12.7.4 INSULATION SYSTEMS 134
- 12.7.4.1 Protects helicopters from heat and fire 134
- 12.8 ACTUATORS 134

**Scotts International. EU Vat number: PL 6772247784**

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

12.9	FILTERS	134
13	HELICOPTER SERVICES MARKET	135
13.1	INTRODUCTION	135
13.2	LEASING	135
13.2.1	WET LEASE	136
13.2.1.1	Demand created by corporates and individuals	136
13.2.2	DRY LEASE	136
13.2.2.1	Presence of helicopter operators drives segment	136
13.3	MAINTENANCE	136
13.3.1	MRO	136
13.3.1.1	PBH	137
13.3.1.1.1	Ease of managing cash flow	137
13.4	AIR TAXIS	137
14	HELICOPTERS OEM MARKET, REGIONAL ANALYSIS	138
14.1	INTRODUCTION	139
TABLE 55	HELICOPTERS OEM MARKET, BY REGION, 2019-2021(USD MILLION)	140
TABLE 56	HELICOPTERS OEM MARKET, BY REGION, 2022-2027 (USD MILLION)	140
14.2	NORTH AMERICA	140
14.2.1	PESTLE ANALYSIS	141
TABLE 57	NORTH AMERICA: HELICOPTERS OEM MARKET, BY APPLICATION, 2019-2021 (USD MILLION)	142
TABLE 58	NORTH AMERICA: HELICOPTERS OEM MARKET, BY APPLICATION, 2022-2027 (USD MILLION)	142
TABLE 59	NORTH AMERICA: MILITARY HELICOPTERS OEM MARKET, BY TYPE, 2019-2021 (USD MILLION)	142
TABLE 60	NORTH AMERICA: MILITARY HELICOPTERS OEM MARKET, BY TYPE, 2022-2027 (USD MILLION)	143
TABLE 61	NORTH AMERICA: CIVIL & COMMERCIAL HELICOPTERS OEM MARKET, BY TYPE, 2019-2021 (USD MILLION)	143
TABLE 62	NORTH AMERICA: CIVIL & COMMERCIAL HELICOPTERS OEM MARKET, BY TYPE, 2022-2027 (USD MILLION)	143
TABLE 63	NORTH AMERICA: HELICOPTERS OEM MARKET, BY COMPONENT & SYSTEM, 2019-2021 (USD MILLION)	143
TABLE 64	NORTH AMERICA: HELICOPTERS OEM MARKET, BY COMPONENT & SYSTEM, 2022-2027 (USD MILLION)	144
TABLE 65	NORTH AMERICA: HELICOPTERS OEM MARKET, BY NUMBER OF ENGINES, 2019-2021 (USD MILLION)	144
TABLE 66	NORTH AMERICA: HELICOPTERS OEM MARKET, BY NUMBER OF ENGINES, 2022-2027 (USD MILLION)	144
TABLE 67	NORTH AMERICA: HELICOPTERS OEM MARKET, BY COUNTRY, 2019-2021 (USD MILLION)	144
TABLE 68	NORTH AMERICA: HELICOPTERS OEM MARKET, BY COUNTRY, 2022-2027 (USD MILLION)	144
14.2.1.1	US	145
14.2.1.1.1	Home to major helicopter manufacturers	145
TABLE 69	US: HELICOPTERS OEM MARKET, BY APPLICATION, 2019-2021 (USD MILLION)	145
TABLE 70	US: HELICOPTERS OEM MARKET, BY APPLICATION, 2022-2027 (USD MILLION)	145
TABLE 71	US: MILITARY HELICOPTERS OEM MARKET, BY TYPE, 2019-2021 (USD MILLION)	145
TABLE 72	US: MILITARY HELICOPTERS OEM MARKET, BY TYPE, 2022-2027 (USD MILLION)	146
TABLE 73	US: CIVIL & COMMERCIAL HELICOPTERS OEM MARKET, BY TYPE, 2019-2021 (USD MILLION)	146
TABLE 74	US: CIVIL & COMMERCIAL HELICOPTERS OEM MARKET, BY TYPE, 2022-2027 (USD MILLION)	146
14.2.1.2	Canada	146
14.2.1.2.1	Initiatives taken by HAC to promote helicopters	146
TABLE 75	CANADA: HELICOPTERS OEM MARKET, BY APPLICATION, 2019-2021 (USD MILLION)	147
TABLE 76	CANADA: HELICOPTERS OEM MARKET, BY APPLICATION, 2022-2027 (USD MILLION)	147
TABLE 77	CANADA: MILITARY HELICOPTERS OEM MARKET, BY TYPE, 2019-2021 (USD MILLION)	147
TABLE 78	CANADA: MILITARY HELICOPTERS OEM MARKET, BY TYPE, 2022-2027 (USD MILLION)	147
TABLE 79	CANADA: CIVIL & COMMERCIAL HELICOPTERS OEM MARKET, BY TYPE, 2019-2021 (USD MILLION)	148
TABLE 80	CANADA: CIVIL & COMMERCIAL HELICOPTERS OEM MARKET, BY TYPE, 2022-2027 (USD MILLION)	148

**Scotts International. EU Vat number: PL 6772247784**

tel. 0048 603 394 346 e-mail: [support@scotts-international.com](mailto:support@scotts-international.com)

[www.scotts-international.com](http://www.scotts-international.com)

## 14.3 EUROPE 148

### FIGURE 32 EUROPE: HELICOPTERS OEM MARKET SNAPSHOT 149

#### 14.3.1 PESTLE ANALYSIS 149

TABLE 81 EUROPE: HELICOPTERS OEM MARKET, BY APPLICATION, 2019-2021 (USD MILLION) 150

TABLE 82 EUROPE: HELICOPTERS OEM MARKET, BY APPLICATION, 2022-2027 (USD MILLION) 150

TABLE 83 EUROPE: MILITARY HELICOPTERS OEM MARKET, BY TYPE, 2019-2021 (USD MILLION) 151

TABLE 84 EUROPE: MILITARY HELICOPTERS OEM MARKET, BY TYPE, 2022-2027 (USD MILLION) 151

TABLE 85 EUROPE: CIVIL & COMMERCIAL HELICOPTERS OEM MARKET, BY TYPE, 2019-2021 (USD MILLION) 151

TABLE 86 EUROPE: CIVIL & COMMERCIAL HELICOPTERS OEM MARKET, BY TYPE, 2022-2027 (USD MILLION) 151

TABLE 87 EUROPE: HELICOPTERS OEM MARKET, BY COMPONENT & SYSTEM, 2019-2021 (USD MILLION) 152

TABLE 88 EUROPE: HELICOPTERS OEM MARKET, BY COMPONENT & SYSTEM, 2022-2027 (USD MILLION) 152

TABLE 89 EUROPE: HELICOPTERS OEM MARKET, BY NUMBER OF ENGINES, 2019-2021 (USD MILLION) 152

TABLE 90 EUROPE: HELICOPTERS OEM MARKET, BY NUMBER OF ENGINES, 2022-2027 (USD MILLION) 152

TABLE 91 EUROPE: HELICOPTERS OEM MARKET, BY COUNTRY, 2019-2021 (USD MILLION) 153

TABLE 92 EUROPE: HELICOPTERS OEM MARKET, BY COUNTRY, 2022-2027 (USD MILLION) 153

##### 14.3.1.1 UK 153

14.3.1.1.1 Increasing adoption of helicopters for commercial operations 153

TABLE 93 UK: HELICOPTERS OEM MARKET, BY APPLICATION, 2019-2021 (USD MILLION) 154

TABLE 94 UK: HELICOPTERS OEM MARKET, BY APPLICATION, 2022-2027 (USD MILLION) 154

TABLE 95 UK: MILITARY HELICOPTERS OEM MARKET, BY TYPE, 2019-2021 (USD MILLION) 154

TABLE 96 UK: MILITARY HELICOPTERS OEM MARKET, BY TYPE, 2022-2027 (USD MILLION) 154

TABLE 97 UK: CIVIL & COMMERCIAL HELICOPTERS OEM MARKET, BY TYPE, 2019-2021 (USD MILLION) 154

TABLE 98 UK: CIVIL & COMMERCIAL HELICOPTERS OEM MARKET, BY TYPE, 2022-2027 (USD MILLION) 155

##### 14.3.1.2 Russia 155

14.3.1.2.1 Ongoing war with Ukraine to affect market growth 155

TABLE 99 RUSSIA: HELICOPTERS OEM MARKET, BY APPLICATION, 2019-2021 (USD MILLION) 155

TABLE 100 RUSSIA: HELICOPTERS OEM MARKET, BY APPLICATION, 2022-2027 (USD MILLION) 155

TABLE 101 RUSSIA: MILITARY HELICOPTERS OEM MARKET, BY TYPE, 2019-2021 (USD MILLION) 156

TABLE 102 RUSSIA: MILITARY HELICOPTERS OEM MARKET, BY TYPE, 2022-2027 (USD MILLION) 156

TABLE 103 RUSSIA: CIVIL & COMMERCIAL HELICOPTERS OEM MARKET, BY TYPE, 2019-2021 (USD MILLION) 156

TABLE 104 RUSSIA: CIVIL & COMMERCIAL HELICOPTERS OEM MARKET, BY TYPE, 2022-2027 (USD MILLION) 156

##### 14.3.1.3 Italy 157

14.3.1.3.1 Increase in military procurement by government 157

TABLE 105 ITALY: HELICOPTERS OEM MARKET, BY APPLICATION, 2019-2021 (USD MILLION) 157

TABLE 106 ITALY: HELICOPTERS OEM MARKET, BY APPLICATION, 2022-2027 (USD MILLION) 157

TABLE 107 ITALY: MILITARY HELICOPTERS OEM MARKET, BY TYPE, 2019-2021 (USD MILLION) 157

TABLE 108 ITALY: MILITARY HELICOPTERS OEM MARKET, BY TYPE, 2022-2027 (USD MILLION) 158

TABLE 109 ITALY: CIVIL & COMMERCIAL HELICOPTERS OEM MARKET, BY TYPE, 2019-2021 (USD MILLION) 158

TABLE 110 ITALY: CIVIL & COMMERCIAL HELICOPTERS OEM MARKET, BY TYPE, 2022-2027 (USD MILLION) 158

##### 14.3.1.4 France 158

14.3.1.4.1 Emergence of lightweight propulsion systems 158

TABLE 111 FRANCE: HELICOPTERS OEM MARKET, BY APPLICATION, 2019-2021 (USD MILLION) 159

TABLE 112 FRANCE: HELICOPTERS OEM MARKET, BY APPLICATION, 2022-2027 (USD MILLION) 159

TABLE 113 FRANCE: MILITARY HELICOPTERS OEM MARKET, BY TYPE, 2019-2021 (USD MILLION) 159

TABLE 114 FRANCE: MILITARY HELICOPTERS OEM MARKET, BY TYPE, 2022-2027 (USD MILLION) 159

TABLE 115 FRANCE: CIVIL & COMMERCIAL HELICOPTERS OEM MARKET, BY TYPE, 2019-2021 (USD MILLION) 160

TABLE 116 FRANCE: CIVIL & COMMERCIAL HELICOPTERS OEM MARKET, BY TYPE, 2022-2027 (USD MILLION) 160

**Scotts International. EU Vat number: PL 6772247784**

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

#### 14.3.1.5 Spain 160

##### 14.3.1.5.1 Aggressive upgrading of helicopter fleets 160

TABLE 117 SPAIN: HELICOPTERS OEM MARKET, BY APPLICATION, 2019-2021 (USD MILLION) 160

TABLE 118 SPAIN: HELICOPTERS OEM MARKET, BY APPLICATION, 2022-2027 (USD MILLION) 161

TABLE 119 SPAIN: MILITARY HELICOPTERS OEM MARKET, BY TYPE, 2019-2021 (USD MILLION) 161

TABLE 120 SPAIN: MILITARY HELICOPTERS OEM MARKET, BY TYPE, 2022-2027 (USD MILLION) 161

TABLE 121 SPAIN: CIVIL & COMMERCIAL HELICOPTERS OEM MARKET, BY TYPE, 2019-2021 (USD MILLION) 161

TABLE 122 SPAIN: CIVIL & COMMERCIAL HELICOPTERS OEM MARKET, BY TYPE, 2022-2027 (USD MILLION) 162

#### 14.3.1.6 Germany 162

##### 14.3.1.6.1 Fast adoption of UAM 162

TABLE 123 GERMANY: HELICOPTERS OEM MARKET, BY APPLICATION, 2019-2021 (USD MILLION) 162

TABLE 124 GERMANY: HELICOPTERS OEM MARKET, BY APPLICATION, 2022-2027 (USD MILLION) 162

TABLE 125 GERMANY: MILITARY HELICOPTERS OEM MARKET, BY TYPE, 2019-2021 (USD MILLION) 163

TABLE 126 GERMANY: MILITARY HELICOPTERS OEM MARKET, BY TYPE, 2022-2027 (USD MILLION) 163

TABLE 127 GERMANY: CIVIL & COMMERCIAL HELICOPTERS OEM MARKET, BY TYPE, 2019-2021 (USD MILLION) 163

TABLE 128 GERMANY: CIVIL & COMMERCIAL HELICOPTERS OEM MARKET, BY TYPE, 2022-2027 (USD MILLION) 163

#### 14.3.1.7 Rest of Europe 164

TABLE 129 REST OF EUROPE: HELICOPTERS OEM MARKET, BY APPLICATION, 2019-2021 (USD MILLION) 164

TABLE 130 REST OF EUROPE: HELICOPTERS OEM MARKET, BY APPLICATION, 2022-2027 (USD MILLION) 164

TABLE 131 REST OF EUROPE: MILITARY HELICOPTERS OEM MARKET, BY TYPE, 2019-2021 (USD MILLION) 164

TABLE 132 REST OF EUROPE: MILITARY HELICOPTERS OEM MARKET, BY TYPE, 2022-2027 (USD MILLION) 164

TABLE 133 REST OF EUROPE: CIVIL & COMMERCIAL HELICOPTERS OEM MARKET, BY WEIGHT, 2019-2021 (USD MILLION) 165

TABLE 134 REST OF EUROPE: CIVIL & COMMERCIAL HELICOPTERS OEM MARKET, BY WEIGHT, 2022-2027 (USD MILLION) 165

#### 14.4 ASIA PACIFIC 165

##### 14.4.1 PESTLE ANALYSIS 166

FIGURE 33 ASIA PACIFIC: HELICOPTERS OEM MARKET SNAPSHOT 167

TABLE 135 ASIA PACIFIC: HELICOPTERS OEM MARKET, BY APPLICATION, 2019-2021 (USD MILLION) 167

TABLE 136 ASIA PACIFIC: HELICOPTERS OEM MARKET, BY APPLICATION, 2022-2027 (USD MILLION) 168

TABLE 137 ASIA PACIFIC: MILITARY HELICOPTERS OEM MARKET, BY TYPE, 2019-2021 (USD MILLION) 168

TABLE 138 ASIA PACIFIC: MILITARY HELICOPTERS OEM MARKET, BY TYPE, 2022-2027 (USD MILLION) 168

TABLE 139 ASIA PACIFIC: CIVIL & COMMERCIAL HELICOPTERS OEM MARKET, BY TYPE, 2019-2021 (USD MILLION) 168

TABLE 140 ASIA PACIFIC: CIVIL & COMMERCIAL HELICOPTERS OEM MARKET, BY TYPE, 2022-2027 (USD MILLION) 169

TABLE 141 ASIA PACIFIC: HELICOPTERS OEM MARKET, BY COMPONENT & SYSTEM, 2019-2021 (USD MILLION) 169

TABLE 142 ASIA PACIFIC: HELICOPTERS OEM MARKET, BY COMPONENT & SYSTEM, 2022-2027 (USD MILLION) 169

TABLE 143 ASIA PACIFIC: HELICOPTERS OEM MARKET, BY NUMBER OF ENGINES, 2019-2021 (USD MILLION) 169

TABLE 144 ASIA PACIFIC: HELICOPTERS OEM MARKET, BY NUMBER OF ENGINES, 2022-2027 (USD MILLION) 170

TABLE 145 ASIA PACIFIC: HELICOPTERS OEM MARKET, BY COUNTRY, 2019-2021 (USD MILLION) 170

TABLE 146 ASIA PACIFIC: HELICOPTERS OEM MARKET, BY COUNTRY, 2022-2027 (USD MILLION) 170

##### 14.4.1.1 China 170

###### 14.4.1.1.1 Increased deployment of helicopters for military applications 170

TABLE 147 CHINA: HELICOPTERS OEM MARKET, BY APPLICATION, 2019-2021 (USD MILLION) 171

TABLE 148 CHINA: HELICOPTERS OEM MARKET, BY APPLICATION, 2022-2027 (USD MILLION) 171

TABLE 149 CHINA: MILITARY HELICOPTERS OEM MARKET, BY TYPE, 2019-2021 (USD MILLION) 171

TABLE 150 CHINA: MILITARY HELICOPTERS OEM MARKET, BY TYPE, 2022-2027 (USD MILLION) 171

TABLE 151 CHINA: CIVIL & COMMERCIAL HELICOPTERS OEM MARKET, BY TYPE, 2019-2021 (USD MILLION) 172

TABLE 152 CHINA: CIVIL & COMMERCIAL HELICOPTERS OEM MARKET, BY TYPE, 2022-2027 (USD MILLION) 172

##### 14.4.1.2 Japan 172

**Scotts International. EU Vat number: PL 6772247784**

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

14.4.1.2.1	Continuous regional conflicts leading to adoption of military helicopters	172
TABLE 153	JAPAN: HELICOPTERS OEM MARKET, BY APPLICATION, 2019-2021 (USD MILLION)	173
TABLE 154	JAPAN: HELICOPTERS OEM MARKET, BY APPLICATION, 2022-2027 (USD MILLION)	173
TABLE 155	JAPAN: MILITARY HELICOPTERS OEM MARKET, BY TYPE, 2019-2021 (USD MILLION)	173
TABLE 156	JAPAN: MILITARY HELICOPTERS OEM MARKET, BY TYPE, 2022-2027 (USD MILLION)	173
TABLE 157	JAPAN: CIVIL & COMMERCIAL HELICOPTERS OEM MARKET, BY TYPE, 2019-2021 (USD MILLION)	173
TABLE 158	JAPAN: CIVIL & COMMERCIAL HELICOPTERS OEM MARKET, BY TYPE, 2022-2027 (USD MILLION)	174
14.4.1.3	India	174
14.4.1.3.1	Strengthening of military capabilities	174
TABLE 159	INDIA: HELICOPTERS OEM MARKET, BY APPLICATION, 2019-2021 (USD MILLION)	174
TABLE 160	INDIA: HELICOPTERS OEM MARKET, BY APPLICATION, 2022-2027 (USD MILLION)	174
TABLE 161	INDIA: MILITARY HELICOPTERS OEM MARKET, BY TYPE, 2019-2021 (USD MILLION)	175
TABLE 162	INDIA: MILITARY HELICOPTERS OEM MARKET, BY TYPE, 2022-2027 (USD MILLION)	175
TABLE 163	INDIA: CIVIL & COMMERCIAL HELICOPTERS OEM MARKET, BY TYPE, 2019-2021 (USD MILLION)	175
TABLE 164	INDIA: CIVIL & COMMERCIAL HELICOPTERS OEM MARKET, BY TYPE, 2022-2027 (USD MILLION)	175
14.4.1.4	South Korea	176
14.4.1.4.1	Need for advanced and fuel-efficient helicopters	176
TABLE 165	SOUTH KOREA: HELICOPTERS OEM MARKET, BY APPLICATION, 2019-2021 (USD MILLION)	176
TABLE 166	SOUTH KOREA: HELICOPTERS OEM MARKET, BY APPLICATION, 2022-2027 (USD MILLION)	176
TABLE 167	SOUTH KOREA: MILITARY HELICOPTERS OEM MARKET, BY TYPE, 2019-2021 (USD MILLION)	176
TABLE 168	SOUTH KOREA: MILITARY HELICOPTERS OEM MARKET, BY TYPE, 2022-2027 (USD MILLION)	177
TABLE 169	SOUTH KOREA: CIVIL & COMMERCIAL HELICOPTERS OEM MARKET, BY TYPE, 2019-2021 (USD MILLION)	177
TABLE 170	SOUTH KOREA: CIVIL & COMMERCIAL HELICOPTERS OEM MARKET, BY TYPE, 2022-2027 (USD MILLION)	177
14.4.1.5	Australia	177
14.4.1.5.1	Collaborations to promote air taxis	177
TABLE 171	AUSTRALIA: HELICOPTERS OEM MARKET, BY APPLICATION, 2019-2021 (USD MILLION)	178
TABLE 172	AUSTRALIA: HELICOPTERS OEM MARKET, BY APPLICATION, 2022-2027 (USD MILLION)	178
TABLE 173	AUSTRALIA: MILITARY HELICOPTERS OEM MARKET, BY TYPE, 2019-2021 (USD MILLION)	178
TABLE 174	AUSTRALIA: MILITARY HELICOPTERS OEM MARKET, BY TYPE, 2022-2027 (USD MILLION)	178
TABLE 175	AUSTRALIA: CIVIL & COMMERCIAL HELICOPTERS OEM MARKET, BY TYPE, 2019-2021 (USD MILLION)	178
TABLE 176	AUSTRALIA: CIVIL & COMMERCIAL HELICOPTERS OEM MARKET, BY TYPE, 2022-2027 (USD MILLION)	179
14.4.1.6	Rest of Asia Pacific	179
14.4.1.6.1	Increased military spending	179
TABLE 177	REST OF ASIA PACIFIC: HELICOPTERS OEM MARKET, BY APPLICATION, 2019-2021 (USD MILLION)	179
TABLE 178	REST OF ASIA PACIFIC: HELICOPTERS OEM MARKET, BY APPLICATION, 2022-2027 (USD MILLION)	179
TABLE 179	REST OF ASIA PACIFIC: MILITARY HELICOPTERS OEM MARKET, BY TYPE, 2019-2021 (USD MILLION)	180
TABLE 180	REST OF ASIA PACIFIC: MILITARY HELICOPTERS OEM MARKET, BY TYPE, 2022-2027 (USD MILLION)	180
TABLE 181	REST OF ASIA PACIFIC: CIVIL & COMMERCIAL HELICOPTERS OEM MARKET, BY TYPE, 2019-2021 (USD MILLION)	180
TABLE 182	REST OF ASIA PACIFIC: CIVIL & COMMERCIAL HELICOPTERS OEM MARKET, BY TYPE, 2022-2027 (USD MILLION)	180
14.5	MIDDLE EAST & AFRICA	181
FIGURE 34	MIDDLE EAST & AFRICA: HELICOPTERS OEM MARKET SNAPSHOT	181
14.5.1	PESTLE ANALYSIS	182
TABLE 183	MIDDLE EAST & AFRICA: HELICOPTERS OEM MARKET, BY APPLICATION, 2019-2021 (USD MILLION)	183
TABLE 184	MIDDLE EAST & AFRICA: HELICOPTERS OEM MARKET, BY APPLICATION, 2022-2027 (USD MILLION)	183
TABLE 185	MIDDLE EAST & AFRICA: MILITARY HELICOPTERS OEM MARKET, BY WEIGHT, 2019-2021 (USD MILLION)	183
TABLE 186	MIDDLE EAST & AFRICA: MILITARY HELICOPTERS OEM MARKET, BY WEIGHT, 2022-2027 (USD MILLION)	183
TABLE 187	MIDDLE EAST & AFRICA: CIVIL & COMMERCIAL HELICOPTERS OEM MARKET, BY TYPE, 2019-2021 (USD MILLION)	184

TABLE 188	MIDDLE EAST & AFRICA: CIVIL & COMMERCIAL HELICOPTERS OEM MARKET, BY TYPE, 2022-2027 (USD MILLION)	184
TABLE 189	MIDDLE EAST & AFRICA: HELICOPTERS OEM MARKET, BY COMPONENT & SYSTEM, 2019-2021 (USD MILLION)	184
TABLE 190	MIDDLE EAST & AFRICA: HELICOPTERS OEM MARKET, BY COMPONENT & SYSTEM, 2022-2027 (USD MILLION)	184
TABLE 191	MIDDLE EAST & AFRICA: HELICOPTERS OEM MARKET, BY NUMBER OF ENGINES, 2019-2021 (USD MILLION)	185
TABLE 192	MIDDLE EAST & AFRICA: HELICOPTERS OEM MARKET, BY NUMBER OF ENGINES, 2022-2027 (USD MILLION)	185
TABLE 193	MIDDLE EAST & AFRICA: HELICOPTERS OEM MARKET, BY COUNTRY, 2019-2021 (USD MILLION)	185
TABLE 194	MIDDLE EAST & AFRICA: HELICOPTERS OEM MARKET, BY COUNTRY, 2022-2027 (USD MILLION)	186
14.5.1.1	Saudi Arabia	186
14.5.1.1.1	Increase in movement of VVIPs and tourists	186
TABLE 195	SAUDI ARABIA: HELICOPTERS OEM MARKET, BY APPLICATION, 2019-2021 (USD MILLION)	186
TABLE 196	SAUDI ARABIA: HELICOPTERS OEM MARKET, BY APPLICATION, 2022-2027 (USD MILLION)	187
TABLE 197	SAUDI ARABIA: MILITARY HELICOPTERS OEM MARKET, BY TYPE, 2019-2021 (USD MILLION)	187
TABLE 198	SAUDI ARABIA: MILITARY HELICOPTERS OEM MARKET, BY TYPE, 2022-2027 (USD MILLION)	187
TABLE 199	SAUDI ARABIA: CIVIL & COMMERCIAL HELICOPTERS OEM MARKET, BY TYPE, 2019-2021 (USD MILLION)	187
TABLE 200	SAUDI ARABIA: CIVIL & COMMERCIAL HELICOPTERS OEM MARKET, BY TYPE, 2022-2027 (USD MILLION)	188
14.5.1.2	Qatar	188
14.5.1.2.1	High prevalence of in-flight business meetings	188
TABLE 201	QATAR: HELICOPTERS OEM MARKET, BY APPLICATION, 2019-2021 (USD MILLION)	188
TABLE 202	QATAR: HELICOPTERS OEM MARKET, BY APPLICATION, 2022-2027 (USD MILLION)	188
TABLE 203	QATAR: MILITARY HELICOPTERS OEM MARKET, BY TYPE, 2019-2021 (USD MILLION)	188
TABLE 204	QATAR: MILITARY HELICOPTERS OEM MARKET, BY TYPE, 2022-2027 (USD MILLION)	189
TABLE 205	QATAR: CIVIL & COMMERCIAL HELICOPTERS OEM MARKET, BY TYPE, 2019-2021 (USD MILLION)	189
TABLE 206	QATAR: CIVIL & COMMERCIAL HELICOPTERS OEM MARKET, BY TYPE, 2022-2027 (USD MILLION)	189
14.5.1.3	UAE	189
14.5.1.3.1	Heavy investments in strengthening defense capabilities	189
TABLE 207	UAE: HELICOPTERS OEM MARKET, BY APPLICATION, 2019-2021 (USD MILLION)	189
TABLE 208	UAE: HELICOPTERS OEM MARKET, BY APPLICATION, 2022-2027 (USD MILLION)	190
TABLE 209	UAE: MILITARY HELICOPTERS OEM MARKET, BY TYPE, 2019-2021 (USD MILLION)	190
TABLE 210	UAE: MILITARY HELICOPTERS OEM MARKET, BY TYPE, 2022-2027 (USD MILLION)	190
TABLE 211	UAE: CIVIL & COMMERCIAL HELICOPTERS OEM MARKET, BY TYPE, 2019-2021 (USD MILLION)	190
TABLE 212	UAE: CIVIL & COMMERCIAL HELICOPTERS OEM MARKET, BY TYPE, 2022-2027 (USD MILLION)	191

**Helicopters Market by Point of Sale, OEM-by Component & System, Type, Application (Military, Civil and Commercial), Number of Engines (Twin Engines, Single Engines) and Region; Aftermarket - by Component & System and Region- Global Forecast to 2027**

Market Report | 2022-09-12 | 300 pages | MarketsandMarkets

To place an Order with Scotts International:

- ☐ - Print this form
- ☐ - Complete the relevant blank fields and sign
- ☐ - Send as a scanned email to support@scotts-international.com

**ORDER FORM:**

Select license	License	Price
	Single User	\$4950.00
	Multi User	\$6650.00
	Corporate License	\$8150.00
	Enterprise Site License	\$10000.00
		VAT
		Total

\*Please circle the relevant license option. For any questions please contact support@scotts-international.com or 0048 603 394 346.

\*\* VAT will be added at 23% for Polish based companies, individuals and EU based companies who are unable to provide a valid EU Vat Numbers.

Email*	<input type="text"/>	Phone*	<input type="text"/>
First Name*	<input type="text"/>	Last Name*	<input type="text"/>
Job title*	<input type="text"/>		
Company Name*	<input type="text"/>	EU Vat / Tax ID / NIP number*	<input type="text"/>
Address*	<input type="text"/>	City*	<input type="text"/>

**Scotts International. EU Vat number: PL 6772247784**

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

Zip Code*	<input type="text"/>	Country*	<input type="text"/>
		Date	2025-06-26
		Signature	<input type="text"/>