

Civil Aerospace Simulation and Training Market - Growth, Trends, Covid-19 Impact, and Forecasts (2023 - 2028)

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Report description:

The civil aerospace simulation and training market is expected to grow at a CAGR of 15% during the forecast period.

Airlines around the globe were aggressively pursuing fleet expansion and network expansion plans before the emergence of the COVID-19 pandemic. However, following the impact of the COVID-19 pandemic, the airlines have canceled and deferred aircraft orders as well as furloughed their pilots to mitigate the losses due to the impact felt by the pandemic. The aviation industry started recovering in 2022 and gradually returning to its pre-COVID-19 level. According to the latest updates from IATA, ICAO, the Airports Council International (ACI), the UN World Tourism Organization (UNWTO), the World Trade Organization (WTO), and the International Monetary Fund (IMF), the international air passenger traffic in 2022 has improved compared to that of 2021. With the recovery of the aviation industry in 2022, the orders and deliveries of commercial aircraft witnessed a gradual increase, which led to a simultaneous increase in demand for simulators and training devices.

As the aviation industry is expected to return to pre-COVID levels and the fleet of commercial aircraft is expected to increase, the demand for pilots is also expected to increase. Also, currently, many airlines are facing the issue of a pilot shortage, which is affecting their daily operations. Generally, flights longer than 12 hours require a team of four pilots. However, several airlines are still operating such long-haul routes with three pilots due to a shortage of pilots. The shortage of pilots is expected to drive demand for new simulation and training solutions.

Also, the planned investments in human space exploration programs during the forecast period are anticipated to generate demand for simulators for astronauts and training solutions in the coming years.

Civil Aerospace Simulation & Training Market Trends

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Full Flight Simulator (FFS) Segment Expected to Account for the Highest Market Share During the Forecast Period

The full flight simulator (FFS) segment dominated the market and is expected to continue in the coming years. The full flight simulator is generally equipped with a motion actuator that replicates flight movement, offering a real-life-like experience inside the simulator that will allow trainees in the aerospace and aviation industries to receive a complete training experience. With the lack of trained and experienced pilots, airlines and companies are working on pilot training programs, which increases the market for full flight simulators. In August 2022, CAE Inc. announced that it had signed a 15-year contract with Qantas Group for the development and operation of a new pilot training center in Sydney. CAE will deploy a new A320 full-flight simulator along with purchasing B787, A330, and B737NG full-flight simulators from the Qantas Group. Currently, the new and advanced FFS are being integrated with new technologies, like virtual reality, to improve the efficiency of training pilots. For instance, in April 2022, the Mexican Federal Civil Aviation Agency awarded certification to Aeromexico's second CAE 7000XR Boeing 737 MAX FFS. The simulator was acquired by the airline to cater to its training requirements as travel demand increased and its fleet grew. In May 2022, at the World Aviation Training Summit (WATS), CAE announced that it was expanding its Toronto Training Center for the purpose of deploying a CAE 7000XR Boeing 787 and a CAE 7000XR Boeing 737 MAX full-flight simulators (FFS). The president of CAE has said that this is to support Canadian airlines as international air travel is returning to normal levels after the COVID-19 pandemic.

Such developments in the market are likely to supplement the growth trajectory of the full flight simulator (FFS) segment over the forecast period.

Asia-Pacific is Anticipated to Register the Highest Growth During the Forecast Period

The increasing passenger traffic in the Asia-Pacific region is propelling the procurement of new aircraft by the airlines and aircraft operators in the region. Major airlines in the region, like China Eastern Airlines, China Southern Airlines, Air China, Indigo, Korean Air, and All Nippon Airways, have huge aircraft orders planned to be delivered during the forecast period. According to Boeing, there will be a demand for more than 244,000 new pilots in the Asia-Pacific region during the next two decades, with a demand for 126,000 pilots from China alone. To increase the pilot training capacity in India, ALSIM was awarded a contract by the Airports Authority of India (AAI) in February 2021 to deliver three Flight Simulator Training Device (FSTD) simulators of EASA Flight Navigation and Procedure Trainer (FNPT) Multi Crew Coordination (MCC) level II types for single-aisle aircraft. All three FNPT II simulators are scheduled to enter service by 2022 at its training centers, namely, CATC Prayagraj, HTC Hyderabad, and NIATAM Gondia. Similarly, in August 2022, Air Asia and CAE Inc. jointly announced that the airlines had chosen CAE's CAE Rise Training System for its simulator training program. Similarly, in February 2022, Airbus introduced a new Airbus A350 FFS to the existing fleet of simulators (one A380, two A320, and two A330 simulators) at the Airbus Asia Training Centre (AATC) in Singapore. Also, major countries in the region are accelerating their human space exploration programs. For instance, China is currently working to build its new space station, which is expected to be completed by 2022, and conducts deep-space human spaceflight by 2030. Such human space exploration plans are anticipated to propel the demand for space simulation and training solutions during the forecast period.

Civil Aerospace Simulation & Training Market Competitor Analysis

The civil aerospace simulation and training market is moderately consolidated. Some of the prominent players in the market for civil aerospace simulation and training are L3Harris Technologies Inc., the Boeing Company, CAE Inc., FlightSafety International, and Indra Sistemas SA. CAE Inc. has a majority share in commercial aviation simulators due to its global presence and brand image. In FY2021, the company delivered 36 full-flight simulators to its civil aviation customers, and in FY2022, the company delivered 30 FFS (a decrease of six simulators compared to the same period in FY2021). Similarly, Lockheed Martin Corporation and The Boeing Company are some of the prominent companies that support NASA human space exploration programs. The

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increasing investments of the companies in developing new simulators with advanced features for training are anticipated to provide them with growth opportunities in the market in the coming years.

Additional Benefits:

The market estimate (ME) sheet in Excel format

3 months of analyst support

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