

Maritime Patrol Aircraft Market - Growth, Trends, Covid-19 Impact, and Forecasts (2023 - 2028)

Market Report | 2023-01-23 | 108 pages | Mordor Intelligence

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Report description:

The maritime patrol aircraft market is anticipated to register a CAGR of over 5% during the forecast period.

The COVID-19 pandemic impacted the supply chain of certain aircraft programs, which resulted in delivery delays in 2020. However, the situation improved in 2021 for several manufacturers across the world. On the other hand, no visible impact was noted on the orders placed by various naval forces globally.

The increasing threat of terrorism and border issues led the countries to strengthen their maritime surveillance, which may propel the demand for maritime patrol aircraft during the forecast period. The increasing military spending, fueled by the growth of territorial conflicts between the countries, has been one of the prime drivers of the market's growth over the years.

Also, the need to replace aging maritime patrol aircraft used beyond their lifetimes with new and advanced aircraft that have greater patrolling capabilities and can perform anti-submarine and anti-surface warfare is expected to generate demand for the maritime patrol aircraft during the forecast period.

However, the availability of surveillance drones as low-cost alternatives and the growing preference for such UAVs can hamper the market's growth during the forecast period.

Maritime Patrol Aircraft Market Trends

Turbofan Segment to Experience the Highest Growth During the Forecast Period

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The turbofan segment is anticipated to have the highest growth in the maritime patrol aircraft market during the forecast period. Maritime patrol aircraft (MPA) driven by turbofan engines have larger endurance due to lower fuel burn rates. Hence, they have higher engine efficiency than their turboprop counterparts. Although the current market demand for new-generation turbofan-powered MPAs is comparatively much lower than that of turboprop MPAs, the adoption is expected to be higher during the forecast period due to the evolving regulations about aviation carbon emissions on a global scale. Moreover, several procurements and modernization programs are underway as nations with naval boundaries seek to enhance their maritime ISR capabilities. The demand for this segment is majorly due to the increasing orders and deliveries of the P-8A Poseidon aircraft of Boeing. This aircraft is currently being procured by the naval forces of countries like the United States, the United Kingdom, South Korea, Australia, and Norway, to replace their aging fleet of turboprop maritime patrol aircraft. This aircraft is derived from the Boeing Next-Generation 737-800 aircraft, with long-range anti-surface warfare, anti-submarine warfare and intelligence, and surveillance and reconnaissance mission capabilities. In February 2022, Boeing delivered the 12th P-8I maritime patrol aircraft to the Indian Navy. The fleet is being operated by the Indian Navy primarily to carry out surveillance in the Indian Ocean. Also, in 2020, a USD 1.5 billion contract was awarded to Boeing to produce an additional 18 P-8A Poseidon maritime patrol and reconnaissance aircraft for the US Navy and two clients under foreign military sales. It will supply the US Navy with eight Lot 11 P-8A aircraft, four to New Zealand and six to the Department of Defense, South Korea. Thus, the orders and deliveries of the P-8A Poseidon aircraft and the development of new aircraft, like Saab Swordfish Maritime Patrol Aircraft, are expected to support the growth of this segment during the forecast period.

Asia-Pacific Accounted for a Major Market Share in 2021

China, Japan, and India are the key markets for maritime patrol aircraft in Asia-Pacific. Increasing military spending, fuelled by ongoing tensions between Asia-Pacific countries, is expected to help the market's growth during the forecast period. The governments in the region are purchasing new aircraft due to the aging fleet of maritime patrol aircraft. Japan received 15 P-1s to replace its fleet of P-3C Orions, which were developed in-house. China also initiated mass production of special mission aircraft, including early warning aircraft, anti-submarine aircraft, electronic warfare aircraft, surveillance aircraft, and a range of warplanes. Once the manufacturing capabilities are achieved, China plans to establish a full information system to increase self-reliance. In November 2021, Y-8Q - China unveiled the first independently developed and manufactured fixed-wing anti-submarine patrol aircraft. This variant of China's Y-8 transport plane integrates reconnaissance, analysis, and attack capabilities. It is mainly used for accurately seeking and attacking enemy submarines. The introduction of the Y-8Q will enhance the People's Liberation Army's overall anti-submarine warfare and maritime patrol capabilities. Also, countries like India and Australia are acquiring P-8 Maritime Patrol Aircraft from the US company Boeing to develop and strengthen their capabilities in the wake of the current territorial issues, which may drive the growth of the marine patrol aircraft market in the region during the forecast period.

Maritime Patrol Aircraft Market Competitor Analysis

The market is highly consolidated, with the majority of the share occupied by very few players. Some of the prominent players in the market are Boeing, Lockheed Martin Corporation, Airbus SE, Dassault Aviation SA, and Textron Inc. With the need for advanced surveillance and reconnaissance and anti-submarine warfare and anti-ship warfare capabilities, the development of new maritime patrol aircraft variants by the OEMs and modifications companies is expected to help them gain prominent positions in the market. For instance, in February 2021, PAL Aerospace and De Havilland Aircraft of Canada Limited ("De Havilland Canada") announced their partnership to develop a fully missionized Dash 8-400 aircraft, called the "Dash 8 P-4" for maritime patrol (MPA), ISR, as well as other applications. With the growing demand for anti-surface warfare and anti-submarine warfare, countries are expected to upgrade MPA's radars, sensor system, and multifunctional digital screen, which can search, detect, and collate stored data and automatically capture and track enemy warships. Due to this factor, companies are enhancing their maintenance and upgrading capabilities. Moreover, in collaboration with governments, companies are investing in the development of new-generation manned maritime patrol aircraft equipped with modern surface ship and submarine detection systems.

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