

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

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Report description:

The civil aviation flight training and simulation market is projected to register a CAGR of over 15% during the forecast period (2022-2027).

Just before the advent of the COVID-19 pandemic, airlines were aggressively expanding their global networks and adding several new aircraft to their fleet every year. However, the situation changed in 2020 and 2021 due to the advent of the COVID-19 pandemic, as several pilots have lost their jobs due to the grounding of airline fleets to curb the spread of the virus. Nevertheless, things are expected to come to normalcy by 2023. Subsequently, the demand for pilots may return to the pre-crisis levels, albeit slowly, in the first half of the forecast period.

The aviation industry witnessed a growing global pilot demand over the years, which, in turn, has led to the high demand for training aircraft and simulators in flight schools. On the other hand, many airlines are facing pilot shortage issues, which are affecting their daily operations. Generally, flights with a duration of more 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 unavailability of trained pilots to cater to the ever-growing demand is expected to generate demand for pilot training globally.

Civil Aviation Flight Training & Simulation Market Trends

The Fixed-wing Aircraft Segment is Projected to Dominate the Market During the Forecast Period

By aircraft type, the fixed-wing segment held the largest market share in 2021, and it is further expected to dominate the market throughout the forecast period. Before the advent of the COVID-19 pandemic, the growth in global air passenger traffic had

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encouraged the fleet expansion programs of several airlines, while the potential business opportunities led to the entry of new airline operators to cater to the demand on new routes. Before the COVID-19 pandemic, with the global unique city pairs growing each year gradually to cross 22,000 in 2019, airlines invested over USD 1 trillion toward the procurement of new aircraft in the last decade. The procurement of new aircraft for both commercial and general aviation created a pilot shortage over the years. Although the pandemic has resulted in a drop in pilot demand, the long-term demand for commercial aircraft pilots remains strong. As per Boeing's 2021 edition of the Pilot & Technician Outlook, the global demand for pilots is projected to be around 612,000 during the next couple of decades. The demand for pilots fostered the establishment of several flight training institutes across the world, which procure flight simulation and training equipment to provide certified training services to aviation aspirants. Though the COVID-19 pandemic resulted in pilot furloughing in 2020 and 2021, airlines are now focusing on long-term growth strategies and have re-started collaborating with pilot training schools to obtain airline-specific training for the pilots. On this note, in February 2021, IndiGo signed a Cadet Pilot Program with Chimes Aviation Academy, as per which 15 cadets will be trained till 2023 and will then be inducted into the airline as pilots. Such developments are envisioned to bolster the growth prospects of the fixed-wing aircraft segment of the market in focus during the forecast period.

North America is Expected to Dominate the Market During the Forecast Period

The North American region held the largest market share in 2021, mainly due to a large aviation market in the United States. Air passenger traffic in the country increased at a rapid pace in the past decade, which has also generated the need for airlines to expand in terms of fleet size and new routes. According to the Bureau of Transportation Statistics, in 2019, US airlines carried 925.5 million passengers. However, the COVID-19 pandemic greatly affected the airline demand in the region. For 2021, US airlines carried 670.4 million passengers, an increase of 83% from 2020 but an overall decrease of 27% from pre-pandemic 2019. According to the FAA, the total number of pilots in the United States has drastically reduced since 1990. However, in the last few years, the number improved, with 103,879 commercial pilots serving the airlines in the United States in 2020. Though the COVID-19 pandemic has resulted in furloughing of pilots in the region in the last two years, a great demand for pilots in the region is anticipated in the latter half of the forecast period. Voluntary departures, changed fleets, and the rapid rise in domestic travel demand created a significant demand upsurge for pilot training in 2021. Hence, several airlines have taken measures to increase their pilot training capabilities. Airlines like American Airlines, United Airlines, and Delta Air Lines have reported that they have ramped up the pilot training to help pilots return to service as quickly as possible. This helped the growth of the market in the region in 2021, and it is expected to continue during the forecast period.

Civil Aviation Flight Training & Simulation Market Competitor Analysis

The civil aviation flight training and simulation market is moderately fragmented. CAE Inc. is the simulator manufacturer on top as the global market leader, mainly due to its huge geographical presence and brand image. L3Harris Technologies Inc., TRU Simulation + Training Inc., FlightSafety International, and The Boeing Company are also some of the other prominent players in the market. Simulation and training providers and equipment manufacturers constantly strive to build brand reputation and reach out to geographic extremes to attract more customers. Flight schools are looking for long-term collaborations with airlines and aircraft operators for pilot training programs, which may help them make sustainable revenues for longer durations. There is a growing demand for simulators that can be re-configured or possibly be upgraded to support newer aircraft models, and the focus on manufacturing such simulators will drive the growth of the players during the forecast period.

Additional Benefits:

The market estimate (ME) sheet in Excel format
3 months of analyst support

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