SCOTTS INTERNATIONAL

Commercial Helicopters 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 commercial helicopters market is anticipated to register a CAGR of more than 6% during the forecast period (2022-2027).

The COVID-19 pandemic has led to increased economic constraints, reduced travel and tourism activities, and decreased industrial output. Several commercial end users faced losses and witnessed a decline in helicopter flight activity in 2020. The pandemic also led to supply chain disruptions in the aviation sector, which led to a significant decrease in deliveries. However, the helicopter fleet activity increased significantly in 2021.

The increase in the usage of helicopters in various end-user sectors, like tourism, medical and emergency rescue services, transportation, and offshore helicopter services, among others, has fuelled the demand for commercial helicopters.

The replacement of aging commercial helicopters along with the development by key market players of new helicopter models with advanced technologies like electric-hybrid propulsion is expected to propel the growth of helicopters over the coming years.

The drones are slowly substituting helicopters in various roles in the commercial sector due to their cheaper cost of operation and reduced risk to humans. This factor is reducing the use of helicopters in certain applications across the industry, thus restraining the market growth.

Commercial Helicopters Market Trends

Light Helicopters Segment Witnessed Highest Number of Deliveries in 2021

The light helicopters segment witnessed the highest number of deliveries in 2021 due to their ability to hover, land, and take off in a vertical position and get in and out of confined spaces. Currently, Airbus Helicopters, Bell, and Robinson Helicopters dominate the market in terms of new deliveries for commercial applications. H125, one of the oldest and most selling helicopters of Airbus, has recently been upgraded. While the maximum take-off weight of the aircraft remains unchanged (about 2.5 ton), its external and internal load-lifting capabilities are increased for a large part of the flight domain (by up to +140 kg), while the hover ceiling OGE at maximum take-off weight is increased by more than 1,500 ft (up to 12,600 ft). In April 2021, Airbus Helicopters received EASA certification for the power upgrade of its single-engine H125 helicopter. With the latest upgrade to H125, Airbus Helicopters is targeting the utility market. In addition to OEMs, helicopter operators are investing in the procurement of new light helicopters to enhance operational efficiency. For instance, Polk County Sheriff's Office (PCSO) in Florida (US) received an R66 Police Helicopter from Robinson Helicopter Company equipped with Wescam MX-10 EO/IR imaging system and an HD infrared sensor. Such orders are anticipated to drive the growth of this market segment during the forecast period.

Europe Held the Highest Share by Revenue in 2021

The European region currently dominates the market and is expected to continue its dominance during the forecast period, primarily due to helicopter operators' growing demand for new helicopters to modernize their aging fleet. In 2021, the European region received 167 units, out of which 66% were light helicopters, followed by medium and heavy helicopters, which accounted for 23% and 11%, respectively. Currently, the overall helicopter fleet in the region has an age of over 18 years, and about more than 50% of the existing operational fleet has an age of more than 26 years. To maintain an air-worthy fleet, the operators in the region are robustly investing in the procurement of new and advanced helicopters. For instance, as of May 2021, Yorkshire Air Ambulance (YAA) planned to replace its current fleet of Airbus H145 D2 helicopters by 2023 with the latest variants that feature major design changes. Similarly, in June 2020, Airbus was awarded funding from the French government to develop a low-emission hybrid-engine successor to its best-selling H125 Ecurueil light-single, plus orders for 20 rotorcraft from its current range, including two H145, 10 H160, and eight H225M helicopters. The hybrid variant of H125 is expected to reduce 40% of the fuel consumption and is expected to enter service by 2029. Such procurement and replacement plans are anticipated to accelerate the growth of the commercial helicopter market in the region.

Commercial Helicopters Market Competitor Analysis

The prominent players in the commercial helicopter market are Airbus SE, Robinson Helicopter Company, Textron Inc., Leonardo SpA, and Russian Helicopters (Rostec). The key players are investing in R&D for manufacturing new types of helicopters integrated with new technologies. For instance, Robinson Helicopter added the TB17 Lithium-ion battery to its R44 options. TB17 by True Blue Power, a division of Mid-Continent Instrument, offers substantial weight savings, improved starter performance, and longer life. The new helicopter option weighs approximately 46% less than the R44's standard 29.5-pound battery. It is now offered on new helicopters for USD 7,300. With such new and advanced helicopter concepts taking shape over the coming years, the competition in the market is expected to be tough. In addition to new product development and options, the partnerships of helicopter OEMs with aircraft/helicopters operators to deliver new-generation rotorcraft are anticipated to support their growth. For instance, in October 2021, Global Medical Response (GMR) placed an order for 21 Airbus helicopters, including the H125, H130, and H135 family of helicopters, with an option for up to an additional 23 helicopters for air medical services. Such contracts are anticipated to help helicopter OEMs increase their geographic presence over the coming years.

Additional Benefits:

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

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