

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

Market Report | 2023-01-23 | 88 pages | Mordor Intelligence

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Report description:

The firefighting aircraft market was valued at USD 2.40 billion in 2021, and the market is projected to register a CAGR of 2.74% during the forecast period (2022-2027).

Although the global economy suffered a major blow due to the COVID-19 pandemic, the spending on firefighting equipment did not experience any declines in 2020 and 2021. Some of the largest bushfire occurrences in the recent past prompted the governments to enhance their aerial firefighting capabilities.

Wildfires or forest fires cause a great deal of devastation every year in various parts of the world. However, only a few countries are equipped with aerial firefighting vehicles to tackle such wildfires. The increasing summer temperatures due to global warming, unattended campfires by humans, and lightning are some reasons for wildfires. There has been an increase in forest fire incidents worldwide in the last decade. Both the duration and the intensity of wildfires witnessed an increase due to various factors, leading to a growth in the usage of helicopters and fixed-wing aircraft for firefighting. In response to the growing number of wildfires, countries are procuring water-bombing aircraft to counter such wildfires quickly and effectively.

However, as the majority of the firefighting aircraft are modified versions of old aircraft, whose subsystems are generally not at their best, they are prone to malfunctioning in non-friendly environments, with hot air and flames being the foremost challenges for the equipment. Such incidents led to accidents that endangered lives and resulted in the loss of both life and property.

Firefighting Aircraft Market Trends

The Rotorcraft Segment Accounted for the Largest Market Share in 2021

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Although helicopters can only carry less fire retardant or water than fixed-wing aircraft, they can be used to transport firefighters and deploy equipment rapidly. Helicopters are useful for fast initial attacks on smaller wildfires. The operational benefits of using rotorcraft for firefighting missions have led to a steady increase in demand for firefighting rotorcraft on a global scale. A wide range of rotorcraft is being used to support firefighting missions, selected based on their suitability for the task and their cost-effectiveness. For instance, in August 2021, Colorado announced that it ordered a state-of-the-art helicopter known as a Sikorsky S70i FIREHAWK manufactured by United Rotorcraft, a division of Air Methods Corporation, to combat wildfires. The helicopter will be delivered sometime in early 2022 and will be ready for use later in the year.

Moreover, with the demand for helicopter conversions for firefighting increasing, several players are converting existing helicopter models into firefighters with the integration of modern internal water tanks and other equipment. For instance, in August 2021, United Rotorcraft announced that it ordered five Sikorsky S-70 helicopters for conversion to the Firehawk firefighting configuration. The conversion work sees the installation of a 1,000 gal external water tank to the helicopter's belly. During the forecast period, such developments render a positive outlook for the rotorcraft segment.

Asia-Pacific to Experience the Highest Growth During the Forecast Period

The prevalent practice of slash-and-burn agriculture, combined with the extreme effects of El Nino and La Nina events, intensified the hazard of forest fires in Asia-Pacific. There have been several instances of forest fires in the region. For instance, in October 2021, a massive forest fire broke out in Chayu County, Nyingchi City, southwest China's Tibet Autonomous Region. The growing instances of wildfire and the extensive damage caused by it have encouraged regional fire protection authorities to expand their firefighting aircraft fleet. For instance, in January 2020, Korea Forest Service (KFS) purchased an S-64 Air Crane helicopter from Erickson Incorporated, a renowned operator, maintainer, and utility aircraft manufacturer. With the delivery of K9 set for 2020, KFS operational aircraft would be seven S-64 Air Crane helicopters in South Korea. Australia has been one of the countries that have seen a significantly higher amount of wildfire activity in the region in the recent past. While 85% of Australia's firefighting air services are either owned by Australian state and territory governments or leased from the Australian commercial sector, the remaining is sourced from overseas. It comprises very large air tankers, large air tankers, and heavy helicopters that can drop a great load. Hence, the country is now focusing on enhancing its aerial firefighting fleet. As of mid-2021, the country procured CH-47D Chinook and Sikorsky S-61 helitanker for its firefighting fleet. Such developments are envisioned to support the market's growth in Asia-Pacific during the forecast period.

Firefighting Aircraft Market Competitor Analysis

The market of firefighting aircraft is highly concentrated, with only a few players in the market. Textron Inc., Leonardo SpA, Lockheed Martin Corporation, ShinMaywa Industries Ltd, and Airbus SE are the major market players, together accounting for a significant share of the total market due to their strong order book and deliveries to firefighting agencies in Europe, North America, and Asia-Pacific and other international firefighting agencies. To increase their footprints in the market, companies are investing in the development of new aircraft models for firefighting with capabilities to carry huge volumes of water and fire retardants. For instance, the Aviation Industry Corporation of China (AVIC) developed a large amphibious aircraft, AG600. The aircraft was mainly developed for supporting forest firefighting and maritime rescue operations. In July 2020, the aircraft completed its sea-based test flight. The company planned to receive the certification of the aircraft in 2021 and deliver the first aircraft to its launch customer in 2022. Similarly, Viking Aircraft developed two new firefighting aircraft models, CL-415EAF (Enhanced Aerial Firefighter) aircraft and CL-515 water bomber aircraft, in the past few years.

Additional Benefits:

The market estimate (ME) sheet in Excel format

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