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Aircraft Auxiliary Power Unit Market - Growth, Trends, Covid-19 Impact, and Forecasts (2023 - 2028)

Market Report | 2023-01-23 | 97 pages | Mordor Intelligence

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Report description:

The aircraft auxiliary power unit market is projected to be over 4% during the forecast period (2023 - 2028).

The COVID-19 pandemic adversely impacted the aircraft auxiliary power unit market. During the pandemic, the demand for new commercial aircraft declined due to a reduction in passenger travel globally. In addition, the supply chain restrictions for the transportation of key components required to manufacture auxiliary power units impacted the market. Nevertheless, the situation improved in 2021 with the increase in passenger traffic, as several airlines resumed taking aircraft deliveries and ordering new aircraft.

The need to produce aircraft with high fuel efficiency, less noise, and carbon emissions may drive the research and development of APU technologies in the years to come. With more electric architecture in aircraft, the development of all-electric APUs increased over the years. The benefits of using these electric APUs may provide further growth opportunities for the market in the future.

Aircraft Auxiliary Power Unit Market Trends

The Commercial Segment Accounted for the Highest Market Share in 2021

Currently, the commercial segment has the highest market share in the aircraft auxiliary power unit market. Though there was a decline in commercial aircraft deliveries in 2020 due to the COVID-19 pandemic, the aircraft deliveries improved in 2021, and the major commercial aircraft OEMs, like Airbus and Boeing, increased their aircraft production and delivery rates accordingly. In 2021, Boeing delivered 340 aircraft, while Airbus SE delivered 611 aircraft. In November 2020, Boeing's 737MAX returned to service after being temporarily grounded since March 2019. The return of the 737MAX back to service has helped the revenue growth of Boeing in 2021. The Boeing Company received orders for 909 aircraft in 2021, while Airbus received 771 new orders in the same year. These numbers reveal that commercial aircraft deliveries may remain healthy during the forecast period.

The aircraft fleet modernization and destination expansion plans of the airlines lead to the gradual revival of aircraft demand, thereby strengthening the order books of aircraft OEMs. In addition to the recovery in demand for passenger aircraft, 2021 also witnessed an increased demand for cargo operations, propelling several freighter operators to order new aircraft. Pratt & Whitney and Honeywell account for the majority share in the commercial aircraft auxiliary power unit market. Honeywell is the major supplier of the APUs for narrow-body aircraft such as the A220, A320, Boeing 737 Max, and upcoming Comac C919. Furthermore, the surge in demand for narrow-body aircraft is expected to drive the demand in the commercial segment during the forecast period.

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

The rapid increase in the passenger traffic of major countries like China, India, and Japan is driving the demand for several new aircraft orders from airlines operating in the Asian-Pacific region. The increasing demand for new aircraft orders is expected to drive the aircraft auxiliary power units market in this region. For instance, in November 2021, India's upcoming low-cost carrier, Akasa Air, placed an order for 72 Boeing 737 MAX jets, valued at nearly USD 9 billion at list prices. The demand for the aircraft is expected to drive the demand for the related APUs in the future. The Chinese aviation industry has also made rapid strides in the last three decades. The aircraft OEM Boeing forecasted that airlines in China may require 8,700 new airplanes by 2040, signifying a high demand for aircraft in the region.

In military aviation, the rise in defense expenditure for the up-gradation of old aircraft fleets is expected to surge the procurement of military aircraft and supplement the demand for aircraft auxiliary power units. For instance, in February 2022 Indonesian ministry of defense signed an agreement to procure 42 French Rafale fighters. The Dassault Aviation Rafale multi-role combat aircraft is equipped with Rubis 3 Auxiliary Power Unit (APU), which Safran SA manufactures. All these factors are expected to generate demand for aircraft auxiliary power units in the Asian-Pacific region during the forecast period.

Aircraft Auxiliary Power Unit Market Competitor Analysis

Honeywell International Inc., Aerosila, Pratt and Whitney (Raytheon Technologies Corporation), Technodinamika, and Safran SA are currently some of the major players in the market. The market is highly consolidated, with these players grabbing a major market share. In the commercial aviation segment, the companies Pratt & Whitney and Honeywell dominate a majority share with their well-established demand for aircraft auxiliary power units from Airbus and Boeing Inc. The military aviation sector is expected to open new opportunities for aircraft auxiliary power unit manufacturers and can register increased competition in the market. The utilization of new technologies, such as electric APUs, and work in this regard so that they may get ready to cater to the next-generation aircraft with more electric architecture may increase the competitive rivalry in the aircraft auxiliary power unit market during the forecast period.

Additional Benefits:

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

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