

Global Commercial Aircraft Market Segmented By Landing Gear Type (Main Landing Gear and Nose Landing Gear), By Aircraft Type (Narrowbody, Widebody, and Regional Jet) By Regional, By Competition Forecast & Opportunities, 2018-2028F

Market Report (3 business days) | 2023-10-03 | 191 pages | TechSci Research

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Report description:

The Global Commercial Aircraft Landing Gear Market reached a value of USD 211 billion in 2022 and is expected to experience robust growth during the forecast period, with a compound annual growth rate (CAGR) of 4.50% projected through 2028. Landing gear refers to the undercarriage of an aircraft or spaceship that supports the entire weight of the vehicle during takeoff and landing. Achieving weight reduction is a critical aspect driving the need for technologically advanced landing gears to enhance fuel efficiency while maintaining the desired balance between payload and flying range of the aircraft. Technological advancements and research and development activities in related industries, such as steering systems, actuation systems, and braking systems, have fueled the expansion of the market. This growth is further propelled by increased air traffic and growth in the airline sector, as well as the demand for advanced lightweight landing gears.

Key Market Drivers:

1. Increasing Air Travel Demand:

The continuous rise in demand for air travel is a primary driver of the Commercial Aircraft Landing Gear market. Factors such as globalization, urbanization, and higher income levels have led to increased passenger volumes, prompting airlines to expand their fleets. As airlines accommodate growing passenger numbers and extend their routes, the demand for landing gear systems for new aircraft also grows. This trend is particularly evident in emerging economies where a burgeoning middle-class population is leading to increased air travel accessibility and frequency. The shift towards short-haul regional flights further accentuates the need for durable landing gear systems capable of withstanding frequent takeoffs and landings.

2. Fleet Modernization Initiatives:

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Ongoing fleet modernization initiatives undertaken by airlines and aircraft operators are a significant market driver. Older aircraft are being phased out to make room for newer, more fuel-efficient models equipped with advanced technologies. Modern aircraft offer improved fuel efficiency, reduced emissions, enhanced passenger comfort, and higher operational reliability. Fleet modernization often involves the adoption of next-generation landing gear systems that align with the advanced features of modern aircraft. These systems are designed to support the unique characteristics of new aircraft, including increased weight, higher takeoff and landing frequencies, and improved performance metrics. As airlines seek to leverage the advantages of modern fleets, the demand for compatible landing gear systems continues to grow, creating a substantial market driver.

3. Fuel Efficiency and Operating Cost Reduction:

The pursuit of fuel efficiency and cost reduction in operations is a driving force in the Commercial Aircraft Landing Gear market. Airlines face constant pressure to optimize operational expenses, and landing gear systems play a crucial role in achieving these goals. Utilizing lightweight materials, advanced designs, and efficient components helps reduce the overall weight of the aircraft, resulting in lower fuel consumption and operating costs. Fuel costs constitute a significant portion of an airline's operating expenses, and even incremental reductions in fuel consumption can lead to substantial savings over an aircraft's lifecycle. Landing gear manufacturers are actively developing systems that minimize energy loss during landing, improve shock absorption, and enhance braking efficiency. As airlines strive to maintain competitiveness and environmental responsibility, landing gear systems offering fuel efficiency benefits become a compelling market driver.

4. Technological Advancements and Innovation:

Rapid technological advancements are fueling innovation in the Commercial Aircraft Landing Gear market. Landing gear systems are becoming increasingly sophisticated, incorporating cutting-edge technologies such as advanced sensors, predictive maintenance algorithms, and health monitoring capabilities. These technologies enable operators to collect real-time data on landing gear performance, detect anomalies, and predict maintenance requirements, leading to optimized operational efficiency. Additionally, innovations in materials science are contributing to the development of lightweight yet durable landing gear components. Carbon composites, titanium alloys, and advanced metals are being integrated into landing gear designs to enhance structural integrity while reducing weight. The integration of electric and green taxiing systems represents another notable technological advancement that addresses both operational efficiency and environmental sustainability. As technological innovation continues to advance, it acts as a compelling market driver, enticing airlines and operators to invest in state-of-the-art landing gear solutions.

5. Growing Air Cargo Operations:

The expansion of air cargo operations is emerging as a significant driver in the Commercial Aircraft Landing Gear market. Beyond passenger transport, the demand for air cargo services is on the rise due to the increasing popularity of e-commerce and global supply chain networks. Cargo aircraft, ranging from dedicated freighters to converted passenger planes, require specialized landing gear systems capable of accommodating heavier loads and various cargo configurations. Cargo operations involve frequent loading and unloading procedures, which place additional stress on landing gear components. As the air cargo sector continues to grow, landing gear manufacturers are developing systems that can withstand the demands of frequent takeoffs, landings, and cargo handling. The efficient transportation of goods by air necessitates robust and reliable landing gear systems, making the growth of air cargo operations a key driver in the market.

6. Emphasis on Passenger Experience and Comfort:

Airlines' focus on passenger experience and comfort is driving investments in aircraft with enhanced cabin amenities and technologies. As airlines compete to attract passengers, they prioritize features that improve onboard comfort, such as quieter cabins, smoother landings, and reduced vibrations. Landing gear systems play a crucial role in delivering a comfortable flying experience. Advanced landing gear designs incorporate shock-absorbing technologies that minimize the impact of landings and reduce vibrations transmitted to the cabin. This results in a smoother and more comfortable passenger experience, particularly during landing procedures. Airlines recognize that passenger satisfaction directly impacts customer loyalty and brand reputation,

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making landing gear systems that contribute to a pleasant flight essential for maintaining a competitive edge.

7. Regulatory Compliance and Safety Mandates:

Regulatory compliance and safety mandates exert a significant influence on the Commercial Aircraft Landing Gear market. Aviation authorities, such as the Federal Aviation Administration (FAA) and the European Union Aviation Safety Agency (EASA), establish stringent safety standards that landing gear systems must adhere to. Aircraft manufacturers and operators are mandated to ensure that landing gear components are structurally sound, reliable, and capable of withstanding various operational conditions.

Key Market Challenges:

1. Cost Pressures and Price Competition:

One of the primary challenges facing the Commercial Aircraft Landing Gear Market is the intense cost pressures and price competition within the aviation industry. Airlines and aircraft manufacturers continuously seek ways to reduce operational expenses and improve profitability. As a result, they often engage in aggressive negotiations for cost-effective solutions, including landing gear systems. Landing gear manufacturers must strike a delicate balance between delivering high-quality, reliable products and meeting stringent cost constraints. The challenge lies in producing landing gear systems that adhere to strict safety and performance standards while remaining competitive in terms of pricing. This cost-driven environment can potentially lead to reduced profit margins for manufacturers, prompting them to explore strategies for efficient production, procurement, and resource management.

2. Technological Complexity and Integration:

The increasing complexity of aircraft systems and the integration of advanced technologies pose a significant challenge to the Commercial Aircraft Landing Gear Market. Modern landing gear systems are no longer simple mechanical assemblies; they incorporate a range of sophisticated technologies, such as health monitoring sensors, predictive maintenance algorithms, and electric taxiing systems. Integrating these technologies seamlessly into landing gear designs requires interdisciplinary expertise and collaboration between mechanical engineers, software developers, and data scientists. Ensuring that these systems operate reliably and interact harmoniously with other aircraft systems demands rigorous testing, validation, and certification processes. As landing gear systems become more technologically advanced, manufacturers face the challenge of maintaining system integrity, optimizing performance, and ensuring interoperability with other aircraft components.

3. Regulatory Compliance and Certification Challenges:

Navigating complex regulatory frameworks and obtaining necessary certifications is a persistent challenge in the Commercial Aircraft Landing Gear Market. Landing gear systems are safety-critical components subject to rigorous testing and certification processes governed by aviation authorities such as the Federal Aviation Administration (FAA) and the European Union Aviation Safety Agency (EASA). Manufacturers must demonstrate compliance with a multitude of safety, structural, and environmental standards. Achieving certification involves extensive testing, analysis, documentation, and collaboration with regulatory bodies. Delays or uncertainties in the certification process can impact project timelines, product launch schedules, and overall business operations. The challenge lies in staying updated with evolving regulatory requirements and investing resources to ensure that landing gear systems meet the highest safety standards.

4. Supply Chain Disruptions and Dependencies:

Global supply chain disruptions and dependencies are challenges that have gained prominence in recent years, impacting various industries, including the Commercial Aircraft Landing Gear Market. Landing gear systems consist of intricate components sourced from suppliers around the world. Any disruption in the supply chain, whether due to geopolitical factors, natural disasters, or logistical challenges, can disrupt production schedules and lead to delays. Furthermore, the dependence on a limited number of

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suppliers for critical components can create vulnerabilities. A shortage of specific materials or components can cause production bottlenecks and hinder the timely delivery of landing gear systems. Landing gear manufacturers are challenged to develop robust and resilient supply chains that mitigate the risks of disruptions, diversify sourcing options, and ensure a consistent flow of components.

5. Complex Maintenance and Overhaul Procedures:

Maintenance and overhaul procedures for landing gear systems are intricate and resource-intensive, posing a challenge for both airlines and maintenance providers. Landing gear maintenance involves comprehensive inspections, component replacements, and adherence to detailed service bulletins provided by manufacturers. The complexity of these procedures requires highly skilled technicians, specialized equipment, and meticulous attention to detail. Airlines aim to minimize aircraft downtime and operational disruptions, making efficient maintenance processes essential. Balancing maintenance needs with operational requirements presents a challenge in terms of scheduling and resource allocation. Moreover, the demand for spare parts and components can lead to supply chain challenges, particularly for older aircraft models where parts availability may be limited. As landing gear systems become more technologically advanced, ensuring the availability of skilled personnel and appropriate facilities for maintenance and overhaul becomes increasingly challenging.

Key Market Trends:

1. Lightweight Materials and Advanced Manufacturing:

A prominent trend within the Commercial Aircraft Landing Gear market is the increasing focus on lightweight materials and advanced manufacturing techniques. Traditionally, landing gear components were constructed from metals like steel, which added weight to the aircraft. However, the industry is moving towards utilizing lightweight materials such as titanium alloys, high-strength composites, and advanced aluminum alloys. These materials not only reduce the overall weight of the landing gear but also enhance strength and durability. Additionally, advanced manufacturing methods like additive manufacturing (3D printing) are being explored to create complex geometries that optimize strength-to-weight ratios and streamline production processes. This trend is driven by the aviation industry's constant pursuit of fuel efficiency and operational cost reduction. Lighter landing gear components contribute to lower fuel consumption, allowing aircraft to operate more efficiently and with reduced environmental impact. As manufacturers refine these materials and techniques, the market is witnessing a shift towards more advanced, lightweight, and durable landing gear systems.

2. Retractable vs. Fixed Landing Gear Systems:

A significant trend in the Commercial Aircraft Landing Gear market pertains to the ongoing debate between retractable and fixed landing gear systems. Each system presents distinct advantages and trade-offs, influencing the design choices made by aircraft manufacturers. Retractable landing gear systems, which can be retracted into the aircraft's fuselage during flight, offer aerodynamic advantages by reducing drag and enhancing fuel efficiency. These systems are commonly seen in commercial airliners to optimize flight performance. On the other hand, fixed landing gear systems, where the landing gear remains exposed even during flight, provide simplicity, reduced maintenance requirements, and potential cost savings. These systems are often found in general aviation aircraft and some military applications. The trend is not about one system overtaking the other, but rather finding a balance. Aircraft manufacturers and airlines carefully evaluate the mission profiles, operating environments, and overall lifecycle costs of their aircraft to determine which landing gear system best suits their needs. This trend emphasizes the importance of tailoring landing gear systems to specific aircraft types and routes for optimal efficiency and performance.

3. Electric and Green Taxiing Systems:

Environmental sustainability is a pivotal concern across the aviation industry, and it is significantly influencing the Commercial Aircraft Landing Gear market. The trend towards electric and green taxiing systems has gained momentum as airlines seek innovative ways to reduce fuel consumption and carbon emissions during ground operations. Electric taxiing systems involve the integration of electric motors into the landing gear, allowing aircraft to taxi on the ground without using main engines. This

reduces the need for engine power during taxiing, leading to fuel savings and emissions reduction. These systems are particularly effective for larger aircraft during taxiing to and from runways and terminals. Green taxiing systems also include regenerative braking technology, where energy generated during braking is captured and reused for powering the aircraft's electrical systems or returned to the electrical grid. This technology further contributes to fuel savings and reduces environmental impact. As airlines and aircraft manufacturers prioritize environmental responsibility, the adoption of electric and green taxiing systems is expected to increase. This trend aligns with the aviation industry's commitment to sustainable practices and reducing its carbon footprint.

4. Integration of Health Monitoring and Predictive Maintenance:

Advancements in data analytics and sensor technology are driving a trend towards the integration of health monitoring and predictive maintenance capabilities in Commercial Aircraft Landing Gear systems. Modern landing gear systems are equipped with sensors that continuously monitor various parameters such as load, stress, temperature, and vibration. These sensors provide real-time data on the condition of landing gear components and help detect any anomalies or signs of wear. By leveraging data analytics and artificial intelligence, operators can predict when components are likely to require maintenance or replacement. This predictive maintenance approach minimizes unscheduled downtime and reduces maintenance costs. Airlines can schedule maintenance tasks more efficiently, ensuring that aircraft remain in service while optimizing the lifecycle of landing gear components. This trend enhances operational efficiency and safety, allowing airlines to proactively address maintenance needs and improve overall fleet reliability. As technology continues to evolve, the integration of health monitoring and predictive maintenance capabilities will become a standard feature in modern landing gear systems.

5. Adoption of Advanced Brake Systems:

The adoption of advanced brake systems is a notable trend in the Commercial Aircraft Landing Gear market. Brake systems are critical components of landing gear, ensuring safe and controlled deceleration during landing and ground operations. As aircraft performance improves and operational demands increase, there is a growing need for brake systems that offer higher efficiency, reliability, and heat dissipation capabilities. Advanced brake systems incorporate technologies such as carbon brakes, which provide superior performance compared to traditional steel brakes. Carbon brakes are lightweight, exhibit excellent heat absorption and dissipation properties, and offer extended maintenance intervals. These benefits contribute to improved operational efficiency, reduced maintenance costs, and enhanced safety. This trend is particularly significant for larger commercial aircraft and those operating in demanding conditions such as high-frequency takeoffs and landings or on shorter runways. As aircraft continue to evolve, the adoption of advanced brake systems is expected to become more widespread.

Segmental Insights:

Landing Gear Type Analysis:

The main landing gear supports the entire weight of the aircraft during the first impact. As a result, they typically feature more tires than nose landing gears. However, manufacturing main landing gear components is costlier due to their complexity and the greater number

of components involved. Consequently, revenue from this category significantly surpasses revenue from the nose landing gears segment. Key income drivers for this segment include widebody aircraft and large cargo aircraft, as they require substantial main landing gear equipment to support the aircraft's weight. Additionally, the costs associated with acquiring new landing gear, maintenance, repair, and operations (MRO), as well as aftermarket expenses for the multi-bogey landing gear used in widebody aircraft, are considerable.

Regional Insights:

North America currently dominates the aviation landing gear industry due to the presence of major players, original equipment manufacturers (OEMs), and component manufacturers. These firms consistently invest in research and development to create more efficient and reliable aircraft landing gear. Additionally, the growing demand for lightweight aircraft for civil and commercial

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applications, along with their increasing utility in the defense sector for persistent transport and surveillance, are factors influencing the growth of the North America aircraft landing gear market. North America has a substantial share of global consumer expenditure, leading to increased demand for air travel in the region.

During the forecast period, Asia Pacific is expected to experience the fastest growth rate. This growth is primarily driven by increased investments in the aviation sector by countries such as India and China, as well as the rising demand for commercial aircraft due to increased air traffic. According to the International Air Transport Association (IATA), Asia-Pacific Airlines experienced a 363.3% increase in full-year international traffic in 2022 compared to 2021, maintaining the highest year-over-year growth among all regions. Capacity increased by 129.9%, and the load factor increased by 37.3 percentage points to reach 74.0% in 2022. December 2022 also saw a 302.7% increase in traffic compared to December 2021.

Key Market Players

Heroux-Devtek Inc.

Circor International Inc.

Magellan Aerospace Corp.

Triumph Group Inc.

Safran SA

Raytheon Technologies Corporation

Sumitomo Precision Products Co. Ltd

AAR CORP.

Liebherr-International Deutschland GmbH

Honeywell International Inc.

Report Scope:

In this report, the Global Commercial Aircraft Landing Gear Market has been segmented into the following categories, in addition to the industry trends which have also been detailed below:

□ Commercial Aircraft Landing Gear Market, By Landing Gear Type:

o Main Landing Gear

o Nose Landing Gear

□ Commercial Aircraft Landing Gear Market, By Aircraft Type:

o Narrowbody

o Widebody

o Regional Jet

□ Commercial Aircraft Landing Gear Market, By Regional:

o North America

□ United States

□ Canada

□ Mexico

o Europe & CIS

□ Germany

□ Spain

□ France

□ Russia

□ Italy

□ United Kingdom

□ Belgium

o Asia-Pacific

□ China

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- ?□India
- ?□Japan
- ?□Indonesia
- ?□Thailand
- ?□South Korea
- ?□Australia
- o□South America
- ?□Brazil
- ?□Argentina
- ?□Colombia
- o□Middle East & Africa
- ?□Turkey
- ?□Iran
- ?□Saudi Arabia
- ?□UAE

Competitive Landscape

Company Profiles: Detailed analysis of the major companies present in the Global Commercial Aircraft Landing Gear Market.

Available Customizations:

Global Commercial Aircraft Landing Gear Market report with the given market data, Tech Sci Research offers customizations according to a company's specific needs. The following customization options are available for the report:

Company Information

?□Detailed analysis and profiling of additional market players (up to five).

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