

## **Aircraft Auxiliary Power Unit - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts 2019 - 2029**

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### **Report description:**

The Aircraft Auxiliary Power Unit Market size is estimated at USD 3.30 billion in 2024, and is expected to reach USD 3.98 billion by 2029, growing at a CAGR of 3.79% during the forecast period (2024-2029).

The COVID-19 pandemic adversely impacted the aircraft auxiliary power unit market. During the pandemic, the demand for new commercial and general aviation aircrafts 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 COVID-19 impact on military aircrafts deliveries was significant. Delays in production and delivery schedules occurred, since 2022, aircraft manufacturers have emphasized on covering backlog and fast deliveries of various military aircrafts. During 2022, Airbus and Boeing delivered 1,156 aircraft to global end users, wherein Airbus accounted for 676 aircraft deliveries while Boeing accounted for the rest.

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 (APU) Market Trends

Commercial Aviation Segment Holds Highest Shares in the Market

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Currently, the commercial segment has the highest market share in the aircraft auxiliary power unit market. Technological advancements in APUs which lead to improved fuel efficiency, reduced emissions, and quieter operations are few factors contributing to the growth of commercial market. Furthermore growing emphasis on passenger comfort and safety is driving the demand for APUs. Airlines are increasingly investing in high-quality APUs to enhance the overall passenger experience and maintain the competitive edge in the market.

For instance, in May 2023, Honeywell has secured a contract from Malaysian Startup MYAirline to support auxiliary power units (APUs) installed on the carrier's Airbus A320s. The agreement covers 131-9A APUs for 22 jets. Also, in July 2022, Whitney & Pratt Canada signed an eight-year maintenance and fleet improvement deal with Turkish Airlines. The deal includes the 82 APS3200 auxiliary power units (APUs) on the airline's fleet of Airbus A320 planes. Such developments and rising APUs installation contracts from airlines drive the growth of the 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. Additionally, countries in Asia Pacific region are investing heavily in modernizing their current aviation fleet. In 2022, Airbus delivered 676 aircraft, and Boeing delivered 480. Globally, Asia leads the market with the most orders for aircraft, with bulk orders from China. Indigo Airlines, an Indian LCC, has the largest single-order backlog with Airbus.

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. All these factors are expected to generate demand for aircraft auxiliary power units in the Asia-Pacific region during the forecast period.

#### Aircraft Auxiliary Power Unit (APU) Industry Overview

The market is highly consolidated with few players grabbing a major market share. Honeywell International Inc., JSC NPP Aerosila, Pratt and Whitney (Raytheon Technologies Corporation), PBS Group, a. s., and Safran are currently some of the major players in the market. 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. 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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