

Commercial Helicopters - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts 2019 - 2029

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Report description:

The Commercial Helicopters Market size is estimated at USD 1.02 billion in 2024, and is expected to reach USD 1.31 billion by 2029, growing at a CAGR of 5.13% during the forecast period (2024-2029).

Commercial helicopters are rotorcraft designed and used for various business and non-military purposes. They are employed in multiple industries and applications, offering versatility and flexibility in transportation, logistics, and other operations, such as firefighting, film and photography, and utility and survey work. The growing demand for rotary platforms, such as helicopters for various applications and end-user industries, such as oil and gas and law enforcement, drives the market.

The intensive use of helicopters for various applications has simultaneously increased the need to incorporate advanced technologies to facilitate their use for contra-distinct purposes. Technological developments like enhancement of the engine performance, improving their performance capabilities, etc., made them more suitable to function in tough and challenging environments. Market players are focusing on enhancing the ergonomics and safety aspects of helicopters. However, the market might witness significant resilience from the rapid growth of the drone industry as they can act as potential substitutes for helicopters, particularly in specific applications for end users.

The commercial helicopter market is highly sensitive to regional economic conditions and their subsequent impact on levels of capital investment and consumer spending. Factors such as the economic downturn can lead to reduced investments, changes in government spending levels, reduced customers' and suppliers' access to credit, hamper consumer confidence, and increase buyers' propensity for cheaper substitutes in specific applications.

Commercial Helicopter Market Trends

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Single Engine Segment Will Showcase Remarkable Growth During the Forecast Period

Most helicopters procured for personal travel are single-engine helicopters, as they fit their travel purposes and offer cheaper acquisition and maintenance costs. These helicopters are often preferred for their simplicity and cost-effectiveness. While they lack redundancy in engine failure compared to multi-engine counterparts, single-engine helicopters are still reliable and excel in various roles, such as aerial surveying, light utility, and short-distance transportation. Single-engine helicopters are commonly used for pilot training. They provide an ideal platform for aspiring helicopter pilots to learn the basics of flying. Example: Robinson R22, which is widely used in flight training.

Single-engine helicopters are employed in agriculture for crop dusting and spraying. The Hughes 369 is one of the most popular utility helicopters for agricultural operations. Enstrom Helicopter Corporation designs and produces light single-engine helicopters for the global market. Its missions include helicopter training, police and wildlife patrol, aerial photography and tours, agriculture spray and livestock management, and personal transportation. For instance, in May 2023, Air Corporate (Italy) gave the contract for 43 Airbus helicopters to Airbus. This contract represents Airbus's biggest aircraft order in Italy, which means that over the next few years, it is expected to deliver helicopters for several private and corporate passenger services and utility operations. The helicopters include 40 single-engine helicopters (H125/H130) plus three ACH160s from Airbus Corporate Helicopters. Such developments are expected to drive the growth of the market during the forecast period.

Asia Pacific is Projected to Show Highest Growth During the Forecast Period

An increase in demand for helicopters for commercial applications like agriculture, aerial photography, tourism, and air ambulance across China, India, Japan, and others drives the growth of the market. China is one of the fastest-growing and most promising markets for commercial helicopters in the Asia-Pacific region. As of December 2022, China had an operational helicopter fleet of 741 helicopters. About 64% of China's fleet was configured for multi-mission roles, while up to 20% was used for Offshore, EMS, and SAR missions.

There were 297 civil registered helicopters in the Asia-Pacific region serving the offshore market, with mainland China accounting for 24% by the end of 2022. The Chinese operator, CITIC Offshore Helicopter Company (COHC), had the largest offshore fleet in Asia-Pacific with 43 helicopters. The H125 and H225 models comprised 33% and 28% of COHC's offshore fleet. The H125 has a maximum MTOW of 2,250kg and can carry up to six passengers, whereas the H225 has a maximum MTOW of 11,160 kg and can carry up to 19 passengers.

Similarly, the Indian government is investing in improving the aviation sector. In May 2023, the Indian Government launched UDAN 5.1 for helicopter routes to boost remote area access. The scheme has already operationalized 46 helicopter routes, which benefits hilly and North-East states. The new UDAN 5.1 aims to cover an even more significant number of ways to expand the reach of air connectivity. Thus, increasing spending on the procurement of commercial helicopters drives the growth of the market across the region.

Commercial Helicopter Industry Overview

The commercial helicopter market is consolidated, with a few players, such as Airbus SE, Textron Inc., Rostec, Kawasaki Heavy Industries Ltd, and Leonardo SpA, holding major market share. Other small/domestic companies occupy a minimal market share. Key players in the market are highly investing in research and development and introducing advanced commercial helicopters. For instance, Leonardo SpA launched its VIP helicopters and travel services under a related new name, "Agusta," and unveiled the heliport called "Casa Agusta" in 2020. The company provides a range of helicopters for the commercial markets, including all the main weight categories, from 1.8-tonne single-engine to 16-tonne three-engine helicopters.

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