

Firefighting Aircraft - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts 2019 - 2029

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Report description:

The Firefighting Aircraft Market size is estimated at USD 539.68 million in 2024, and is expected to reach USD 712.39 million by 2029, growing at a CAGR of 5.71% during the forecast period (2024-2029).

Firefighting aircraft need large hold containers for liquid storage. This is achieved using tanks in the aircraft hold area with additional external tanks or a combination. The tank is used for storing water or any other retardant, which is used to extinguish the fire by dropping the retardant from the aircraft rather than using any pressurized method for deployment.

The tanks fitted to the firefighting aircraft may hold water or a chemical fire-retardant foam or gel. Various countries are employing a new method to extinguish the fire by dropping retardant ahead of the fire to control the spread. Several firefighting aircraft are fitted on-ground with high-pressure hoses, enabling them to make repeated flights to extinguish the fire. Various other firefighting aircraft have space in the hold area and can fill water from a nearby lake en route to the wildfire site. Some widely used aircraft for firefighting include the Boeing B747, McDonnell Douglas DC-10, and the BAe 146 aerial firefighting aircraft.

The increase in the number of forest fire incidents worldwide, as well as the growing need for more efficient aircraft, has led to various manufacturers converting existing aircraft and helicopter lineups to be used as a firefighting aircraft thereby driving the market during the forecast period. On the other hand, higher chances of aircraft malfunction will be a significant factor that will hamper the market's growth in the future.

Firefighting Aircraft Market Trends

Rotorcraft Segment Will Showcase Remarkable Growth During the Forecast Period

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The rotorcraft segment is anticipated to show significant growth in the market during the forecast period. A wide range of rotorcraft is used to support firefighting missions selected based on suitability and cost-effectiveness. Compared to fixed-wing aircraft, helicopters can carry less fire retardant or water, and they can also be used to transport firefighters and equipment. Helicopters are useful for fast initial attacks on smaller wildfires.

Several countries are converting helicopters into firefighters by integrating modern internal water tanks. For instance, in March 2023, United Rotorcraft, which outfits the Sikorsky Black Hawk helicopter platform as S-70 FIREHAWKS, started evaluating several options and upgrades to the firefighting and emergency rescue helicopter program. The improvements include a 1,000-gallon composite water tank that the company produces in collaboration with Dart. Furthermore, United Rotorcraft has delivered 17 FIREHAWKS: 12 newly built S-70is and five converted from legacy military HH/UH-60s since 2001. It estimates that the fleet has accumulated more than 10,000 hours of flight time thus far.

United Rotorcraft is expected to hand over seven more FIREHAWKS in the current year; its backlog shows five, with deliveries scheduled in 2025. Currently, all operators of the helicopter operate in California: Cal Fire, Los Angeles County Fire Department, San Diego County, Ventura County, and Santa Barbara County. This year, the Orange County Fire Authority will join that list with expected delivery. Meanwhile, the FIREHAWK will finally escape the state's borders with the first delivery to the Colorado Department of Fire Prevention and Control. San Diego Gas and Electric will also become the first private operator of a FIREHAWK when it receives the first type-certified S-70M.

Thus, technological developments in helicopter engines and tanks capable of carrying more water or retardant, equipment improvements, and technological advancements that can help firefighters operate at night are expected to support the segment's growth through new orders from various firefighting agencies worldwide.

North America is Projected to Show Highest Growth During the Forecast Period

North America is anticipated to show the highest growth in the firefighting market during the forecast period. Wildfires are prevalent in the United States and Canada. They may be triggered by natural causes such as lightning or human activity, such as unextinguished smoking materials, faulty electrical equipment, overheating automobiles, or arson. According to the US National Interagency Fire Center, around 66,255 wildfire incidents occurred in 2022. Similarly, Canada reported 3,623 incidents of wildfires that affected an area of 245,014 ha.

The wildfire control agencies in North America use several types of firefighting aircraft, such as Single Engine Airtankers (SEATs), Large Airtankers (LATs), Very Large Airtankers (VLATs), Water Scoopers, and Smokejumpers. The US Forest Service contracted several different providers to offer aerial firefighting services from air tankers in 2020, including 10 Tanker, Coulson Aviation, Aero Air, Aero Flite Inc., and Neptune Aviation. Fixed-wing aircraft deployed by these companies include DC-10s, C-130s, MD-87, RJ-85, Nae-146, and B737. King Air 90 and 200s, OV-10s, and BE-90 and BE-200s can be used as lead planes and identifiers or command and control aircraft.

For instance, in September 2023, the De Havilland Aircraft of Canada Limited was awarded a contract for 22 new DHC-515 Firefighter planes by the Canadian government, which are set to be delivered by the end of 2027. Thus, the prevalence of wildfire occurrences and the need for firefighting aircraft are anticipated to drive the market's growth during the forecast period.

Firefighting Aircraft Industry Overview

The firefighting market is consolidated, with a few players holding significant shares in the market. Some of the key players in the market are Lockheed Martin Corporation, Airbus SE, Leonardo S.p.A., Textron Inc., and Shinmaywa Industries Ltd. Key players in

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the market are highly investing in research and development and the introduction of advanced solutions for firefighting aircraft. For instance, in August 2022, Textron Inc. announced that it had delivered two Beechcraft King Air 260 aircraft to the US Forest Service. The aircraft will perform wildfire mapping missions. The King Air 260 aircraft was modified to install the latest imaging TK-9 Earthwatch airborne sensor, infrared (IR) sensing technology, and legacy US Forest Service sensors that can accurately map wildfires, even at night and through smoke.

Additional Benefits:

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

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