

Aircraft Auxiliary Power Unit Market By Type (Commercial Aviation, Military Aviation, General Aviation), By Aircraft Type (Fixed Wing, Rotary Wing) By Product (Battery Power, Electric Ground Power, Others) : Global Opportunity Analysis and Industry Forecast, 2024-2033

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Abstracts

The auxiliary power units' market was valued at \$3.32 billion in 2022 and is estimated to reach \$4.88 billion by 2032, exhibiting a CAGR of 4.2% from 2023 to 2032.

APU, referred to as auxiliary power unit, is a compact jet engine typically situated in the rear section of an aircraft. Its main purpose is to provide electrical and pneumatic power to the aircraft when the main engines are not operational. Although commonly equipped in the tail section, the APU can sometimes be found in the wheel well or an engine nacelle. By utilizing an APU, the aircraft can operate independently without relying on any ground support systems, such as a ground power unit (GPU), external air-conditioning unit, or high-pressure air start cart. The APU plays a crucial role in powering the aircraft's electrical systems and ensuring air conditioning and pressurization while the aircraft is on the ground.

The aircraft auxiliary power units market is projected to experience consistent growth during the forecast period. Several trends driving the market include advancement in APU technology, rise in need for more fuel-efficient APUs, incorporation of advanced materials into aircraft systems, and significant focus on digitalization and improved connectivity in aviation. The advancement in APU technology is highlighted through Honeywell's 131 Series of APU. Originally designed for the Boeing MD-90, this series rapidly evolved to meet the changing demands of the aviation industry. In particular,

the 131-9D model became the top choice for various aircraft models, including the Boeing 737NG family, Airbus A320 family, and Airbus A220.

However, high development cost has hampered the growth of the auxiliary power units market, developing and certifying new APUs for aviation use involves significant time, resources, and investment. Contrarily, agreements between key players present lucrative opportunities for growth of the market. In February 2024, China Southern Airlines and Lufthansa Technik have inked an exclusive eight-year contract, focusing on technical support for the auxiliary power units (APUs) within the Chinese carrier's A350 fleet, totaling 20 aircraft. Under this long-term agreement, Lufthansa Technik will deliver comprehensive maintenance, repair, and overhaul (MRO) services for the Honeywell HGT1700 in the company's dedicated APU workshops situated in Hamburg, Germany.

Segmentation Overview

The auxiliary power units' market is segmented into film type, aircraft type, product, and region. Depending on the film type, the market is classified into commercial aviation, military aviation, and general aviation. As per aircraft type, it is segregated into fixed wing and rotary wing. According to the product, the market is categorized into battery power, electric ground power, and others. Region wise, the market is analyzed across North America, Europe, Asia-Pacific, Latin America, Latin America, and Middle East Africa.

Key Findings

Depending on the film type, the commercial aviation segment acquired the largest market share in 2022.

According to aircraft type, the fixed wing segment accounted for the highest market share in 2022.

As per the product, the electric ground power segment gained the maximum market share in 2022.

Region wise, Asia-Pacific dominated the aircraft auxiliary power units market in 2022.

Competitive Scenario

The report analyzes the profiles of key players operating in the aircraft auxiliary power

units' market such as AEGIS Power Systems Inc., Eaton Corporation plc, Honeywell International Inc., JSC NPP Aerosila, Motor Sich JSC, PBS Group, a. s., Pratt & Whitney (Raytheon Technologies Corporation), Rolls-Royce plc, Safran, and Technodinamika (Rostec). These players have adopted various strategies to increase their market penetration and strengthen their position in the market.

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Investment Opportunities

Market share analysis of players by products/segments

Regulatory Guidelines

Additional company profiles with specific t%li%client's interest

Additional country or region analysis- market size and forecast

Market share analysis of players at global/region/country level

SWOT Analysis

Key Market Segments

By Type

Commercial Aviation

Military Aviation

General Aviation

By Aircraft Type

Fixed Wing

Rotary Wing

By Product

Battery Power

Electric Ground Power

Others

By Region

North America

U.S.

Canada

Mexico

Europe

France

Germany

Italy

Spain

UK

Russia

Rest of Europe

Asia-Pacific

China

Japan

India

South Korea

Australia

Thailand

Malaysia

Indonesia

Rest of Asia-Pacific

LAMEA

Brazil

South Africa

Saudi Arabia

UAE

Argentina

Rest of LAMEA

Key Market Players

AEGIS Power Systems Inc.

Eaton Corporation plc

Honeywell International Inc.

JSC NPP Aerosila

Motor Sich JSC

PBS Group, a. s.

Pratt & Whitney (Raytheon Technologies Corporation)

Rolls-Royce plc.

Safran

Technodinamika (Rostec)

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