

Global Refueling Aircraft Market Size study & Forecast, by Component (Aviation refueler, Dispenser, Refueling Pod, Probe & Drogue and Others), by Aircraft Type (Commercial Airplane, Military Airplane, Helicopter), by Refueling Medium (Air-to-Air Refueling, Tanking Method) and Regional Analysis, 2023-2030

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Abstracts

Global Refueling Aircraft Market is valued at approximately USD 14.8 billion in 2022 and is anticipated to grow with a healthy growth rate of more than 4.5% during the forecast period 2023-2030. Tanker aircraft, also known as Refueling Aircraft are capable of transferring fuel to an aircraft while it is parked at an airport (ground refueling) or in flight (air-to-air refueling). They let airplanes to stay in the air longer without having to land for fuel, increasing their endurance and range. Modern refueling aircraft use many systems to transfer gasoline without leaks. Air refueling saves time in emergency situations, which is critical for many fighter planes. The Refueling Aircraft Market is expanding because of factors such as rising expenditure in defense by governments worldwide, surging technological advancements and rising geopolitical tensions between various nations.

Aerial refueling is an important part of many military missions. Refueling planes are commonly used in the defense industry to extend the range of fighters, bombers, and other aircraft. Major governments around the world are making significant investments in military and defense capabilities. For instance, The US Department of Defense (DOD) invested USD 704.0 billion in the fiscal year 2020-2021, an increase over the previous year. Similarly, developing countries are making major investments in the military and defense sectors. For instance, Japan has declared intentions to invest more than USD 51.0 billion in the military and defense sectors in the fiscal year 2021. In

addition,, aviation industry is a major contributor to greenhouse gas emissions, accounting for around 2% of global emissions. As environmental concerns rise, sustainable aviation fuels (SAF) are emerging as a game-changer, presenting lucrative market opportunities for firms across the refueling market. SAF can significantly reduce lifecycle carbon emissions compared to traditional jet fuel, often by up to 80%. This aligns with airlines' and airports' sustainability goals, enhancing their brand image and attracting environmentally conscious customers. For instance, according to a report by the International Air Transport Association, Airlines are increasingly looking for ways to reduce their carbon footprint, including the use of Sustainable Aviation Fuels (SAF) in their operations. However, factors such as stringent safety regulations and complex integration with advanced aircraft propulsions hampers the market growth throughout the forecast period 2023-2030.

The key regions considered for the Global Refueling Aircraft Market study includes Asia Pacific, North America, Europe, Latin America, and Middle East & Africa. North America dominated the market in 2022 owing to factors such as a rise in the military & defence sector, the geographical presence of leading companies such as Eaton Corporation, GE Aviation and Lockheed Martin and a surge in technological developments for various military uses. Asia Pacific is expected to grow significantly over the forecast period, owing to factors such as a rise in defense expenditure by various nations in the region, the development of advanced aerospace technologies, the establishment of premier technology institutions such as IITs.

Major market player included in this report are:

Lockheed Martin Corporation

Eaton Corporation

OMEGA Air Refuelling Services Inc.

AFS Aviation Fuel Services GmbH

General Electric (GE) Aerospace

Marshall Group

Garsite LLC

Cobham Ltd.

Northrop Grumman Corporation

The Boeing Company

Recent Developments in the Market:

In February 2023, Stratom and Imenco formed a strategic cooperation to provide high-quality robotic refueling systems to a global customer base. This relationship grants access to established, cutting-edge solutions that ensure the safe and long-term implementation of autonomous refueling in a variety of sectors, including industrial, aviation, defense, and offshore. The alliance sought to increase company value by providing dependable and innovative autonomous refueling solutions.

In January 2024, ZeroAvia and Verne signed a Memorandum of Understanding (MoU) to jointly examine the feasibility of using C₂H₂ as onboard aeroplane fuel. Furthermore, they intend to investigate C₂H₂ refueling methods using sources such as Gaseous Hydrogen (GH₂) and Liquid Hydrogen (LH₂).

In February 2023, Boeing has acquired agreements to purchase 5.6 million gallons (21.2 million liters) of blended sustainable aviation fuel (SAF) from Neste, the world's largest producer of SAF. This contract is intended to support Boeing's commercial operations in the United States through 2023. These deals represent a huge increase, doubling the company's SAF purchase from the previous year.

Global Refueling Aircraft Market Report Scope:

Historical Data – 2020 - 2021

Base Year for Estimation – 2022

Forecast period - 2023-2030

Report Coverage - Revenue forecast, Company Ranking, Competitive Landscape, Growth factors, and Trends

Segments Covered - Component, Aircraft Type, Refueling Medium, Region

Regional Scope - North America; Europe; Asia Pacific; Latin America; Middle East & Africa

Customization Scope - Free report customization (equivalent up to 8 analyst's working hours) with purchase. Addition or alteration to country, regional & segment scope*

The objective of the study is to define market sizes of different segments & countries in recent years and to forecast the values to the coming years. The report is designed to incorporate both qualitative and quantitative aspects of the industry within countries involved in the study.

The report also caters detailed information about the crucial aspects such as driving factors & challenges which will define the future growth of the market. Additionally, it also incorporates potential opportunities in micro markets for stakeholders to invest along with the detailed analysis of competitive landscape and product offerings of key players. The detailed segments and sub-segment of the market are explained below:

By Component:

Aviation Refueler

Dispenser

Refueling Pod

Probe & Drogue

Others

By Aircraft Type:

Commercial

Military Airplane

Helicopter

By Refueling Medium:

Air-to-Air Refueling

Tanking Method

By Region:

North America

U.S.

Canada

Europe

UK

Germany

France

Spain

Italy

ROE

Asia Pacific

China

India

Japan

Australia

South Korea

RoAPAC

Latin America

Brazil

Mexico

Middle East & Africa

Saudi Arabia

South Africa

Rest of Middle East & Africa

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