

Global Aviation Maintenance, Repair and Overhaul (MRO) Market: Analysis By Type, By Aircraft Type, By Aircraft Generation, By End User, By Region Size and Trends with Impact of COVID-19 and Forecast up to 2026

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Abstracts

MRO is a notation for maintenance, repair, and overhaul. This term refers to a set of activities and operations associated with the maintenance of an aircraft. This includes structural, systematic, or equipment-related plant or facility repairs. Also, the term encompasses anything that has a significant impact on a facility's daily spending and aircraft maintenance-related activities. In 2021, the global aviation maintenance, repair and overhaul market, was valued at US\$71.82 billion, and is probable to reach US\$106.64 billion by 2026.

Individuals' increased air travel for business and pleasure would increase aircraft production in the future, significantly impacting the aviation maintenance, repair and overhaul market. Increasing technological innovations and digitalization in aviation maintenance, repair and overhaul is further expected to bolster the growth of market over the next few years. The aviation maintenance, repair and overhaul market is projected to grow at a CAGR of 6.3%, during the forecast period of 2022-2026.

Market Segmentation Analysis:

By Type: The report splits the global aviation maintenance, repair and overhaul market into five different types: Engine maintenance, Components, Line maintenance, Modifications and Airframe Heavy. The Engine maintenance segment accounted for majority of share of approximately 44% of the aviation MRO market in 2021. In the future, the rapid fleet expansion plans of airlines and military forces are expected to

propel the aircraft engine MRO market even further. Furthermore, the introduction of newer generation engines in new aircraft is expected to increase demand for aircraft engine MRO. The new engines would have higher material requirements than previous generations of aircraft.

By Aircraft Type: The market report has bifurcated the global aviation maintenance, repair and overhaul market into two segments on the basis of aircraft type: Narrow body, and Wide body. Wide body segment held more than half of the share in aviation maintenance, repair and overhaul market in 2021, while the same segment is the fastest growing during the forecast period, owing to the increasing trend of turbofan engines in wide body aircrafts. Over the last decade, the outsourcing of wide body aircraft MRO requirements to service providers in the Asia-Pacific region has been a prevalent industry trend.

By Aircraft Generation: The aviation maintenance, repair and overhaul market report has categorized the global market into three segments on the basis of aircraft generation: Old generation, mid generation and new generation. Mid generation aircraft held more than 60% of the share in aviation MRO market in 2021. The fastest growing segment is new generation aircrafts as the new-generation aircraft are more fuel-efficient aircraft, they are powered by sustainable fuel. Major players in the market are making collaborations with OEMs for aircraft maintenance and developing services for new-generation aircraft.

By End User: The market report has bifurcated the global aviation maintenance, repair and overhaul market into two segments on the basis of aircraft type: Commercial, and Military. Commercial segment held the major share of 71% in the aviation maintenance, repair and overhaul market, where as military is the fastest growing segment as with the advancement in AI and analytics, MRO companies are progressing from centralized maintenance diagnostic operations to prescriptive maintenance operations. The increasing complexity of engine parts and the increased number of military aircraft crashes due to engine failures have resulted in the global armed forces' increasing focus on frequent engine maintenance and periodic checks.

By Region: According to this report, the global aviation maintenance, repair and overhaul market can be divided into five major regions, on the basis of geographical areas: Asia Pacific (China, Japan, India, South Korea, Australia and Rest of Asia Pacific), North America (The US, Mexico, and Canada), Europe (Germany, UK, France, Italy and Rest of Europe), Latin America and Middle East and Africa. The Asia Pacific aviation maintenance, repair and overhaul market enjoyed the highest share of 33% in

2021, primarily owing to the dominance of China, Taiwan, South Korea, which are the Asia-Pacific most attractive market for aviation MRO. Growth in China's MRO space has accelerated as firms from the region's emerging economies, such as Thailand and Indonesia, begin to open offices in China. Furthermore, several Chinese airlines have established their own MRO departments.

Global Aviation Maintenance, Repair and Overhaul Market Dynamics:

Growth Drivers: Aviation Maintenance, Repair and Overhaul industry is mounting due to the increase in global defense spending. Increased budget for the defense had led to increase in the number of military aircrafts and maintenance of them is required from time to time. Recent rising geopolitical tensions have led to renewed interest among governments to raise defense spend. Further, the market is expected to increase due to increased air traffic, rising investment in aircraft MRO software, rising government support, passenger-to-freighter (P2F) conversion, etc. in recent years.

Challenges: The global supply chain disruption, has led to a delay in expected aircraft-retirement which has affected used parts, or used serviceable material (USM), availability. Maintenance, Repair and Overhaul facilities is identifying a course of action to balance their inventory holdings efficiently. A slowdown in supply chain and shortage of chips in the market, describes how small fluctuations in demand at the retail level can cause progressively larger fluctuations in demand at the wholesale, distributor, manufacturer, and raw-material supplier levels, in the aviation parts.

Trends: A major trend gaining pace in aviation maintenance, repair and overhaul market is the growing business travel. In future, the business travel and corporate travel would be increased and it would lead to the demand for the air transport such as aircrafts, airplanes, private jets, etc., which requires the maintenance and repair. More trends in the market are believed to augment the growth of aviation MRO market during the forecasted period include sustainability, digitalization, adoption of block chain technology, emerging use of retrofitting technologies for improved aircrafts and inspection robots And drones, etc.

Impact Analysis of COVID-19 and Way Forward:

During the pandemic, the aviation maintenance, repair, and overhaul market saw a sharp drop as a lockdown was imposed suddenly and there were travel restrictions, which led to a decline in the use of air transport and the maintenance of aircrafts and airplanes was reduced so that companies could cut costs. Many aviation companies

also faced losses and were shut down. However, from 2021 onwards, the aviation maintenance, repair, and overhaul market grew dramatically due to increased passenger travel after COVID and the recovery of cancelled orders for aircrafts and airplanes that require maintenance and repair on a regular basis.

Competitive Landscape and Recent Developments:

The market players present in the aircraft MRO market are mainly focusing on product and service enhancements by integrating advanced features and technologies into their offerings.

The key players of the aviation maintenance, repair, and overhaul market are:

Air France Industries KLM Engineering and Maintenance

SIA Engineering

Delta Airlines (Delta TechOps Service Group)

Singapore Technologies Engineering Ltd

Airbus SE

General Electrics (GE Aviation)

Turkish Technics

Aviation Technical Services

MRO Holding Inc.

Hong Kong Aircraft Engineering Company Ltd

AAR Corporation

Lufthansa Technik

The market players in aviation maintenance, repair, and overhaul have opted various

strategies such as merger and acquisitions, partnerships and collaborations. For instant, FL Technics, acquired Wright International. The acquisition of Wright International grants FL Technics a foothold in the strategically important North American market and allowed it to serve its airline clients across an even wider network of international locations. Also, GE Aviation and Etihad Airways together launched GE's 360 Foam Wash, a groundbreaking jet engine cleaning system, to optimize performance of Etihad's GE90 and GEnx-1B engines on its Boeing 777 and 787 fleets.

Capitalizing on the rapid pace of digitization, it can also be seen that MRO players that will emerge stronger from the COVID-19 pandemic are the ones that reinvent their existing business models and embrace technological innovation and streamline operational processes. For instance, ST Engineering received authorization from the Civil Aviation Authority of Singapore (CAAS) to utilize its in-house developed drone solution, DroScan, to conduct General Visual Inspection (GVI) during aircraft maintenance on approved aircraft models, including the A320 family. The utilization of smart analytics could complement inspectors' review process in terms of detecting, classifying and rectifying defects.

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