

Global Air-to-Air Refueling Supply, Demand and Key Producers, 2026-2032

<https://marketpublishers.com/r/GE643AA63A9BEN.html>

Date: January 2026

Pages: 109

Price: US\$ 4,480.00 (Single User License)

ID: GE643AA63A9BEN

Abstracts

The global Air-to-Air Refueling market size is expected to reach \$ 4980 million by 2032, rising at a market growth of 4.3% CAGR during the forecast period (2026-2032).

Air-to-air refueling (AAR) refers to the process of transferring fuel from a tanker aircraft (tanker aircraft) to a receiver aircraft during flight. This capability extends the combat radius, endurance, and mission flexibility of military aircraft, enabling strategic force projection and rapid deployment. The system incorporates technologies such as hose-and-air duct, flight boom, and probe-and-air duct, and integrates fuel management, communication, and safety systems. The AAR industry chain includes upstream suppliers of aviation-grade fuel systems, hydraulics, avionics, composite materials, and precision engineering components; midstream manufacturers of complete aircraft, integrating fuel transfer mechanisms, control electronics, safety systems, and testing platforms; and downstream applications primarily from the Air Force, defense contractors, and military aviation units. Supporting services cover installation, maintenance, training, calibration, and mission support to ensure safe and reliable operation. The gross profit margin of major companies in the industry ranges from 20% to 40%.

The Air-to-Air Refueling market is driven by rising defense budgets, modernization of military fleets, and the need for extended-range and rapid-response capabilities. Advanced refueling systems enhance operational flexibility, force projection, and interoperability among allied forces. Technological trends include automation, digital monitoring, and integration with multi-role aircraft. Demand is supported by global military operations, strategic deployments, and replacement of aging tanker fleets. Manufacturers focus on improving safety, reliability, and system integration while complying with stringent aerospace regulations.

This report studies the global Air-to-Air Refueling demand, key companies, and key regions.

This report is a detailed and comprehensive analysis of the world market for Air-to-Air Refueling, and provides market size (US\$ million) and Year-over-Year (YoY) growth, considering 2025 as the base year. This report explores demand trends and competition, as well as details the characteristics of Air-to-Air Refueling that contribute to its increasing demand across many markets.

Highlights and key features of the study

Global Air-to-Air Refueling total market, 2021-2032, (USD Million)

Global Air-to-Air Refueling total market by region & country, CAGR, 2021-2032, (USD Million)

U.S. VS China: Air-to-Air Refueling total market, key domestic companies, and share, (USD Million)

Global Air-to-Air Refueling revenue by player, revenue and market share 2021-2026, (USD Million)

Global Air-to-Air Refueling total market by Type, CAGR, 2021-2032, (USD Million)

Global Air-to-Air Refueling total market by Application, CAGR, 2021-2032, (USD Million)

This report profiles major players in the global Air-to-Air Refueling market based on the following parameters - company overview, revenue, gross margin, product portfolio, geographical presence, and key developments. Key companies covered as a part of this study include Safran, Eaton Corporation, Parker Hannifin Corporation, Draken International, Kappa optronics, AFSC, Marshall Aerospace and Defence Group, Jeppesen, Airbus, etc.

This report also provides key insights about market drivers, restraints, opportunities, new product launches or approvals.

Stakeholders would have ease in decision-making through various strategy matrices used in analyzing the world Air-to-Air Refueling market

Detailed Segmentation:

Each section contains quantitative market data including market by value (US\$ Millions), by player, by regions, by Type, and by Application. Data is given for the years 2021-2032 by year with 2025 as the base year, 2026 as the estimate year, and 2027-2032 as the forecast year.

Global Air-to-Air Refueling Market, By Region:

United States

China

Europe

Japan

South Korea

ASEAN

India

Rest of World

Global Air-to-Air Refueling Market, Segmentation by Type:

MPRS

Wing-to-Wing Refueling

Simple Grappling Refueling

Global Air-to-Air Refueling Market, Segmentation by Technology Integration:

Autonomous Refueling Systems

Manned Refueling Operations

Global Air-to-Air Refueling Market, Segmentation by Aircraft Type:

Tanker Aircraft

Receiver Fighter Aircraft

Transport Aircraft with AAR Capability

Global Air-to-Air Refueling Market, Segmentation by Application:

Fighter Aircraft

Tanker Aircraft

Military Transport

Unmanned Aerial Vehicles

Attack Helicopters

Transport Helicopters

Companies Profiled:

Safran

Eaton Corporation

Parker Hannifin Corporation

Draken International

Kappa optronics

AFSC

Marshall Aerospace and Defence Group

Jeppesen

Airbus

Key Questions Answered

1. How big is the global Air-to-Air Refueling market?
2. What is the demand of the global Air-to-Air Refueling market?
3. What is the year over year growth of the global Air-to-Air Refueling market?
4. What is the total value of the global Air-to-Air Refueling market?
5. Who are the Major Players in the global Air-to-Air Refueling market?
6. What are the growth factors driving the market demand?

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