

Global Aircraft Heavy Maintenance and Overhaul Services Supply, Demand and Key Producers, 2026-2032

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Abstracts

The global Aircraft Heavy Maintenance and Overhaul Services market size is expected to reach \$ 109638 million by 2032, rising at a market growth of 4.2% CAGR during the forecast period (2026-2032).

Aircraft Overhaul Services refer to regulated, technically intensive maintenance activities performed on aircraft, engines, APUs, landing gear, avionics, hydraulic systems, cabin systems, structural assemblies and other critical aviation assets under approved airworthiness frameworks and manufacturer maintenance documentation.

This study focuses on heavy maintenance and overhaul work that materially restores serviceability, extends operating life, supports airworthiness release and enables aircraft or major systems to return to operation. The core service scope includes base maintenance, C-checks and D-checks, engine shop visits, performance restoration, APU overhaul, landing gear overhaul, component repair and overhaul, structural repair, cabin reconfiguration, aircraft painting and passenger-to-freighter conversion where such work forms part of an approved heavy maintenance process. The sector is characterised by high certification barriers, intensive labour and engineering requirements, significant spare-parts consumption, strict safety accountability and long-term customer relationships.

Pricing varies materially by aircraft type, engine model, work scope, life-limited part status and contract structure, ranging from several hundred thousand US dollars for certain narrowbody heavy checks to several million or more for widebody heavy maintenance and large commercial engine overhaul events.

Based on our research, Aircraft Overhaul Services should not be treated as a generic aircraft maintenance market. The industry is more accurately understood as a regulated, asset-critical service system built around continuing airworthiness, fleet life-cycle management and operational reliability. The appropriate narrow scope centres on base heavy maintenance, engine and APU overhaul, landing gear and component overhaul, structural repair, cabin reconfiguration, painting and heavy-check release activities. Line maintenance, parts trading, maintenance software and pure continuing airworthiness management should be treated separately. Demand is structurally resilient because aircraft operators cannot indefinitely defer mandatory maintenance without affecting airworthiness, safety and asset availability. In the current cycle, delayed new aircraft deliveries, ageing fleets and engine supply-chain bottlenecks have made overhaul capacity a strategic constraint for airlines, lessors and OEMs.

From the supply side, the global market is organised around a multi-layer structure that combines engine OEMs, airline-affiliated MRO providers, independent third-party MRO groups and regional specialist shops. Engine overhaul remains more concentrated because access to technical data, life-limited parts, test cells, OEM authorisation and long-term service agreements creates high barriers to entry. Airframe heavy maintenance and component overhaul are more geographically distributed, as airlines require capacity near operating hubs, leasing transition centres and lower-cost engineering labour pools. This explains why global leaders such as Lufthansa Technik, AFI KLM E&M, ST Engineering, HAECO and AAR coexist with strong regional providers such as Ameco, GAMECO, GMF AeroAsia, EGAT, Joramco and FL Technics.

Demand growth is being driven by the interaction of fleet utilisation recovery, aircraft delivery delays, older aircraft staying in service longer and a more complex engine maintenance cycle. Narrowbody aircraft create the largest volume base for airframe checks and component overhaul, while widebody aircraft and large commercial engines generate higher-ticket overhaul events. Engine shop visit constraints are especially important because longer turnaround times raise spare engine leasing demand and affect airline schedule reliability. IATA has highlighted higher maintenance costs from ageing fleets and excess engine leasing costs linked to engines spending longer in maintenance, which supports the conclusion that overhaul capacity has become a structural bottleneck rather than a purely cyclical issue.

The competitive direction is moving from labour-based maintenance capacity toward integrated engineering, material, data and authorised-network capability. Leading suppliers are investing in engine MRO, nacelle repair, component repair, used serviceable material, predictive maintenance and long-term support contracts. Recent

official disclosures and company announcements show continued investment by ST Engineering, Pratt & Whitney and Embraer in additional MRO capacity, reflecting a broader shift toward regionalised overhaul networks located near major fleet growth centres and supply-chain nodes.

This report studies the global Aircraft Heavy Maintenance and Overhaul Services demand, key companies, and key regions.

This report is a detailed and comprehensive analysis of the world market for Aircraft Heavy Maintenance and Overhaul Services, 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 Aircraft Heavy Maintenance and Overhaul Services that contribute to its increasing demand across many markets.

Highlights and key features of the study

Global Aircraft Heavy Maintenance and Overhaul Services total market, 2021-2032, (USD Million)

Global Aircraft Heavy Maintenance and Overhaul Services total market by region & country, CAGR, 2021-2032, (USD Million)

U.S. VS China: Aircraft Heavy Maintenance and Overhaul Services total market, key domestic companies, and share, (USD Million)

Global Aircraft Heavy Maintenance and Overhaul Services revenue by player, revenue and market share 2021-2026, (USD Million)

Global Aircraft Heavy Maintenance and Overhaul Services total market by Maintained Asset, CAGR, 2021-2032, (USD Million)

Global Aircraft Heavy Maintenance and Overhaul Services total market by Application, CAGR, 2021-2032, (USD Million)

This report profiles major players in the global Aircraft Heavy Maintenance and Overhaul Services 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 GE Aerospace, Rolls-Royce Holdings plc, RTX, Lufthansa Technik AG, MTU Aero Engines AG, StandardAero, Inc., Safran S.A., ST Engineering Commercial Aerospace, AFI KLM E&M, HAECO Group, 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 Aircraft Heavy Maintenance and Overhaul Services market

Detailed Segmentation:

Each section contains quantitative market data including market by value (US\$ Millions), by player, by regions, by Maintained Asset, 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 Aircraft Heavy Maintenance and Overhaul Services Market, By Region:

United States

China

Europe

Japan

South Korea

ASEAN

India

Rest of World

Global Aircraft Heavy Maintenance and Overhaul Services Market, Segmentation by Maintained Asset:

Airframe Overhaul

Engine and APU Overhaul

Landing Gear and Component Overhaul

Other

Global Aircraft Heavy Maintenance and Overhaul Services Market, Segmentation by Aircraft Platform:

Commercial Aircraft

Regional and Turboprop Aircraft

Business Jets and Special Mission Aircraft

Other

Global Aircraft Heavy Maintenance and Overhaul Services Market, Segmentation by Application:

Airlines

Lessors and Asset Owners

OEM and Authorized Networks

Government and Defense Operators

Other

Companies Profiled:

GE Aerospace

Rolls-Royce Holdings plc

RTX

Lufthansa Technik AG

MTU Aero Engines AG

StandardAero, Inc.

Safran S.A.

ST Engineering Commercial Aerospace

AFI KLM E&M

HAECO Group

Delta TechOps

AAR Corp.

Turkish Technic Inc.

SIA Engineering Company

SR Technics Group

Boeing Global Services

Airbus Services

Embraer S.A.

Bombardier Inc.

Aviation Technical Services

MRO Holdings

FL Technics

Joramco

Ameco

GAMECO

HAECO Xiamen

GMF AeroAsia

EGAT

Israel Aerospace Industries

Key Questions Answered

1. How big is the global Aircraft Heavy Maintenance and Overhaul Services market?
2. What is the demand of the global Aircraft Heavy Maintenance and Overhaul Services market?
3. What is the year over year growth of the global Aircraft Heavy Maintenance and Overhaul Services market?
4. What is the total value of the global Aircraft Heavy Maintenance and Overhaul Services market?
5. Who are the Major Players in the global Aircraft Heavy Maintenance and Overhaul Services market?
6. What are the growth factors driving the market demand?

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