

Global Aircraft Heavy Maintenance and Overhaul Services Market 2026 by Company, Regions, Type and Application, Forecast to 2032

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Abstracts

According to our (Global Info Research) latest study, the global Aircraft Heavy Maintenance and Overhaul Services market size was valued at US\$ 81493 million in 2025 and is forecast to a readjusted size of US\$ 109638 million by 2032 with a CAGR of 4.2% during review period.

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 is a detailed and comprehensive analysis for global Aircraft Heavy Maintenance and Overhaul Services market. Both quantitative and qualitative analyses are presented by company, by region & country, by Maintained Asset and by Application. As the market is constantly changing, this report explores the competition, supply and demand trends, as well as key factors that contribute to its changing demands across many markets. Company profiles and product examples of selected competitors, along with market share estimates of some of the selected leaders for the year 2025, are provided.

Key Features:

Global Aircraft Heavy Maintenance and Overhaul Services market size and forecasts, in consumption value (\$ Million), 2021-2032

Global Aircraft Heavy Maintenance and Overhaul Services market size and forecasts by region and country, in consumption value (\$ Million), 2021-2032

Global Aircraft Heavy Maintenance and Overhaul Services market size and forecasts, by Maintained Asset and by Application, in consumption value (\$ Million), 2021-2032

Global Aircraft Heavy Maintenance and Overhaul Services market shares of main players, in revenue (\$ Million), 2021-2026

The Primary Objectives in This Report Are:

To determine the size of the total market opportunity of global and key countries

To assess the growth potential for Aircraft Heavy Maintenance and Overhaul Services

To forecast future growth in each product and end-use market

To assess competitive factors affecting the marketplace

This report profiles key 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.

Market segmentation

Aircraft Heavy Maintenance and Overhaul Services market is split by Maintained Asset and by Application. For the period 2021-2032, the growth among segments provides accurate calculations and forecasts for Consumption Value by Maintained Asset and by Application. This analysis can help you expand your business by targeting qualified niche markets.

Market segment by Maintained Asset

Airframe Overhaul

Engine and APU Overhaul

Landing Gear and Component Overhaul

Other

Market segment by Aircraft Platform

Commercial Aircraft

Regional and Turboprop Aircraft

Business Jets and Special Mission Aircraft

Other

Market segment by Application

Airlines

Lessors and Asset Owners

OEM and Authorized Networks

Government and Defense Operators

Other

Market segment by players, this report covers

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

Market segment by regions, regional analysis covers

Global Aircraft Heavy Maintenance and Overhaul Services Market 2026 by Company, Regions, Type and Application,...

North America (United States, Canada and Mexico)

Europe (Germany, France, UK, Russia, Italy and Rest of Europe)

Asia-Pacific (China, Japan, South Korea, India, Southeast Asia and Rest of Asia-Pacific)

South America (Brazil, Rest of South America)

Middle East & Africa (Turkey, Saudi Arabia, UAE, Rest of Middle East & Africa)

The content of the study subjects, includes a total of 13 chapters:

Chapter 1, to describe Aircraft Heavy Maintenance and Overhaul Services product scope, market overview, market estimation caveats and base year.

Chapter 2, to profile the top players of Aircraft Heavy Maintenance and Overhaul Services, with revenue, gross margin, and global market share of Aircraft Heavy Maintenance and Overhaul Services from 2021 to 2026.

Chapter 3, the Aircraft Heavy Maintenance and Overhaul Services competitive situation, revenue, and global market share of top players are analyzed emphatically by landscape contrast.

Chapter 4 and 5, to segment the market size by Maintained Asset and by Application, with consumption value and growth rate by Maintained Asset, by Application, from 2021 to 2032.

Chapter 6, 7, 8, 9, and 10, to break the market size data at the country level, with revenue and market share for key countries in the world, from 2021 to 2026. and Aircraft Heavy Maintenance and Overhaul Services market forecast, by regions, by Maintained Asset and by Application, with consumption value, from 2027 to 2032.

Chapter 11, market dynamics, drivers, restraints, trends, Porters Five Forces analysis.

Chapter 12, the key raw materials and key suppliers, and industry chain of Aircraft Heavy Maintenance and Overhaul Services.

Chapter 13, to describe Aircraft Heavy Maintenance and Overhaul Services research findings and conclusion.

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