

Global Auxiliary Power Units (APUs) Supply, Demand and Key Producers, 2026-2032

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Abstracts

The global Auxiliary Power Units (APUs) market size is expected to reach \$ 10860 million by 2032, rising at a market growth of 5.9% CAGR during the forecast period (2026-2032).

An Auxiliary Power Unit (APU) is an independent onboard power and energy module designed to supply electrical power, compressed air, and essential thermal management when the main propulsion system is off or when prolonged idling is uneconomical or restricted. Typically packaged as an integrated compartment or engine-bay module, an APU consists of a prime mover (small gas turbine, diesel engine, or fuel-cell-based system), generator and power electronics, compressor/bleed-air hardware, fuel and lubrication circuits, control unit and sensors, intake/exhaust with noise attenuation, cooling, and vibration isolation. It is engineered for high reliability, low noise, low emissions, and maintainability across harsh operating environments. Major production bases are concentrated in regions with mature aerospace and advanced powertrain supply chains, including the United States, France, the United Kingdom, Canada, Germany, Japan, and China. Application scenarios span commercial and military aircraft, business jets and helicopters, heavy-duty trucks and long-haul coaches for hotel loads and cabin HVAC during parking, rail and off-road equipment for auxiliary electrification, as well as marine and remote-duty onboard backup power.

In 2025, global Auxiliary Power Units (APUs)—defined broadly to include aircraft APUs, on-highway truck sleeper/parked-power APUs, and selected military/off-highway auxiliary power modules—reached an estimated 0.28–0.42 million units, of which aircraft-grade APUs accounted for roughly 2,500–3,500 units when triangulated against major OEM aircraft deliveries and typical spares demand, with the balance driven mainly by truck parked-power applications. On a manufacturer ex-works basis (a close proxy for

FOB), pricing is highly tiered: truck APUs typically cluster around about USD 5,000–12,500 per unit, while mainstream commercial-aviation APUs carry reference OEM/list prices commonly around USD 0.8–2.2 million per unit.

Globally, APU demand is being shaped by two reinforcing forces. First, the value of “assured onboard energy” is rising as fleets face uneven ground-support infrastructure, expanding utilization, and higher auxiliary loads driven by extreme weather and comfort requirements, making dependable self-contained power a critical enabler of operational resilience. Second, fuel efficiency and compliance are accelerating the shift away from main-engine idling: more operators are treating parked-time electricity, HVAC, and auxiliary loads as a measurable life-cycle cost lever, and APUs can reduce fuel burn, limit wear, and improve dispatch readiness in a way that is easy to quantify. In parallel, electrification and digitalization are redefining the product roadmap, with higher electrical output, finer energy management, and embedded health monitoring/predictive maintenance pushing APUs from “backup equipment” toward a central node in the platform energy architecture.

At the same time, the industry faces multi-dimensional constraints. Tighter noise and emissions requirements raise R&D and certification thresholds, while hot-section parts, control electronics, and supply-chain stability increasingly influence lead times and cost volatility. In some use cases, ground power, shore power, and larger battery systems can partially substitute traditional APUs, forcing suppliers to widen differentiation through weight, efficiency, maintenance intervals, and total cost of ownership. Downstream demand is therefore bifurcating: aviation platforms are trending toward higher electric output, stronger environmental capability, and deeper system integration; on-road applications are moving faster toward electric or hybrid APUs combined with onboard storage and integrated thermal management to meet long-duration parking, comfort, and low-emission targets simultaneously. Under the broader energy transition, low-carbon fuels and fuel-cell-based APU pathways are also advancing from pilots toward commercialization validation, emerging as a key battleground for next-cycle competitiveness.

This report studies the global Auxiliary Power Units (APUs) production, demand, key manufacturers, and key regions.

This report is a detailed and comprehensive analysis of the world market for Auxiliary Power Units (APUs) 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 Auxiliary Power Units (APUs) that

contribute to its increasing demand across many markets.

Highlights and key features of the study

Global Auxiliary Power Units (APUs) total production and demand, 2021-2032, (Units)

Global Auxiliary Power Units (APUs) total production value, 2021-2032, (USD Million)

Global Auxiliary Power Units (APUs) production by region & country, production, value, CAGR, 2021-2032, (USD Million) & (Units), (based on production site)

Global Auxiliary Power Units (APUs) consumption by region & country, CAGR, 2021-2032 & (Units)

U.S. VS China: Auxiliary Power Units (APUs) domestic production, consumption, key domestic manufacturers and share

Global Auxiliary Power Units (APUs) production by manufacturer, production, price, value and market share 2021-2026, (USD Million) & (Units)

Global Auxiliary Power Units (APUs) production by Type, production, value, CAGR, 2021-2032, (USD Million) & (Units)

Global Auxiliary Power Units (APUs) production by Application, production, value, CAGR, 2021-2032, (USD Million) & (Units)

This report profiles key players in the global Auxiliary Power Units (APUs) market based on the following parameters - company overview, production, value, price, gross margin, product portfolio, geographical presence, and key developments. Key companies covered as a part of this study include Honeywell International Inc., Safran Power Units, Pratt & Whitney Canada, PBS GROUP, a.s., MOTOR SICH, JSC, JSC SPE 'Aerosila', Jakadofsky GmbH, Thermo King, Carrier Transicold, Green APU, 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 Auxiliary Power Units (APUs) market

Detailed Segmentation:

Each section contains quantitative market data including market by value (US\$ Millions), volume (production, consumption) & (Units) and average price (US\$/Unit) by manufacturer, 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 Auxiliary Power Units (APUs) Market, By Region:

United States

China

Europe

Japan

South Korea

ASEAN

India

Rest of World

Global Auxiliary Power Units (APUs) Market, Segmentation by Type:

Aircraft Apus

Vehicle Apus

Marine And Others

Global Auxiliary Power Units (APUs) Market, Segmentation By Technology:

Gas Turbine (Non-Electric)

Electric And Hybrid-Electric

Fuel Cell And Others

Global Auxiliary Power Units (APUs) Market, Segmentation By Power Rating:

Below 90 Kva

Above 90 Kva

Global Auxiliary Power Units (APUs) Market, Segmentation By End-User:

Aftermarket

Oem (Original Equipment Manufacturer)

Global Auxiliary Power Units (APUs) Market, Segmentation by Application:

Commercial Aviation

Defense And Military

Ground Transportation And Others

Companies Profiled:

Honeywell International Inc.

Safran Power Units

Pratt & Whitney Canada

PBS GROUP, a.s.

MOTOR SICH, JSC

JSC SPE 'Aerosila'

Jakadofsky GmbH

Thermo King

Carrier Transicold

Green APU

Go Green APU, LLC

The Dewey Electronics Corporation

Marvin Land Systems

Elbit Systems Ltd.

Epsilor-Electric Fuel Ltd.

Aero Engine Corporation of China, Ltd.

Key Questions Answered:

1. How big is the global Auxiliary Power Units (APUs) market?
2. What is the demand of the global Auxiliary Power Units (APUs) market?
3. What is the year over year growth of the global Auxiliary Power Units (APUs) market?
4. What is the production and production value of the global Auxiliary Power Units (APUs) market?
5. Who are the key producers in the global Auxiliary Power Units (APUs) market?
6. What are the growth factors driving the market demand?

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