

Global Aircraft Heavy Maintenance and Overhaul Services Market Growth (Status and Outlook) 2026-2032

<https://marketpublishers.com/r/G2209B40597AEN.html>

Date: July 2026

Pages: 175

Price: US\$ 3,660.00 (Single User License)

ID: G2209B40597AEN

Abstracts

The global Aircraft Heavy Maintenance and Overhaul Services market size is predicted to grow from US\$ 77477 million in 2025 to US\$ 105816 million in 2032; it is expected to grow at a CAGR of 4.5% from 2026 to 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.

LPI (LP Information)' newest research report, the 'Aircraft Heavy Maintenance and Overhaul Services Industry Forecast' looks at past sales and reviews total world Aircraft Heavy Maintenance and Overhaul Services sales in 2025, providing a comprehensive analysis by region and market sector of projected Aircraft Heavy Maintenance and Overhaul Services sales for 2026 through 2032. With Aircraft Heavy Maintenance and Overhaul Services sales broken down by region, market sector and sub-sector, this report provides a detailed analysis in US\$ millions of the world Aircraft Heavy Maintenance and Overhaul Services industry.

This Insight Report provides a comprehensive analysis of the global Aircraft Heavy Maintenance and Overhaul Services landscape and highlights key trends related to product segmentation, company formation, revenue, and market share, latest development, and M&A activity. This report also analyses the strategies of leading global companies with a focus on Aircraft Heavy Maintenance and Overhaul Services portfolios and capabilities, market entry strategies, market positions, and geographic footprints, to better understand these firms' unique position in an accelerating global Aircraft Heavy Maintenance and Overhaul Services market.

This Insight Report evaluates the key market trends, drivers, and affecting factors shaping the global outlook for Aircraft Heavy Maintenance and Overhaul Services and breaks down the forecast by Maintained Asset, by Application, geography, and market size to highlight emerging pockets of opportunity. With a transparent methodology based on hundreds of bottom-up qualitative and quantitative market inputs, this study forecast offers a highly nuanced view of the current state and future trajectory in the global Aircraft Heavy Maintenance and Overhaul Services.

This report presents a comprehensive overview, market shares, and growth opportunities of Aircraft Heavy Maintenance and Overhaul Services market by product type, application, key players and key regions and countries.

Segmentation by Maintained Asset:

Airframe Overhaul

Engine and APU Overhaul

Landing Gear and Component Overhaul

Other

Segmentation by Aircraft Platform:

Commercial Aircraft

Regional and Turboprop Aircraft

Business Jets and Special Mission Aircraft

Other

Segmentation by Application:

Airlines

Lessors and Asset Owners

OEM and Authorized Networks

Government and Defense Operators

Other

This report also splits the market by region:

Americas

United States

Canada

Mexico

Brazil

APAC

China

Japan

Korea

Southeast Asia

India

Australia

Europe

Germany

France

UK

Italy

Russia

Middle East & Africa

Egypt

South Africa

Israel

Turkey

GCC Countries

The below companies that are profiled have been selected based on inputs gathered from primary experts and analyzing the company's coverage, product portfolio, its market penetration.

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

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