

# **Air-to-Air Refueling Market by System (Probe & Drogue, Boom Refueling, Autonomous), Component (Pumps, Valves, Hoses, Boom, Probes, Fuel Tanks, Pods), Aircraft Type (Fixed, Rotary), Type (Manned, Unmanned), End User, Region - Global Forecast to 2025**

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## **Abstracts**

The air-to-air refueling market size is projected to grow from an estimated USD 501 million in 2020 to USD 851 million by 2025, at a CAGR of 11.2% during the forecast period. Increasing demand for air-to-air refueling systems to support overseas deployments, increased defense expenditure of countries, development of advanced aerial tankers, and increase in combat aircraft procurement are some of the key factors driving the growth in the air-to-air refueling market. The increasing demand for autonomous refueling is one of the lucrative opportunities for air-to-air refueling system providers during the forecast period.

The outbreak of COVID-19 and its resultant lockdowns and supply chain disruptions have adversely affected the aerospace and defense industry, with the suspension and delay of new defense procurement and maintenance projects. OEMs have been significantly affected due to restrictions and the temporary halts in production, while the impact on the aftermarket has been comparatively lower due to the basic maintenance and monitoring requirements of combat aircraft. For instance, in October 2020, the Boeing KC-46A Pegasus in-flight refueling tanker program reported a USD 67 million loss due to coronavirus disruptions resulting in production inefficiencies.

Based on end user, the aftermarket segment accounts for the largest market size during the forecast period

Based on end user, the air-to-air refueling market has been segmented into OEM and Aftermarket. The aftermarket segment is estimated to lead the air-to-air refueling market during the forecast period. The aftermarket companies offer complete maintenance, repair, and overhaul services. For example, damaged components of air-to-air refueling systems, such as hydraulic systems, fuel management systems, and safety systems, are considered for maintenance, repair, and overhaul. The aftermarket also offers repairing services for over-the-counter products in case hydraulic components such as pumps, couplings, and nozzles are damaged beyond repair.

Based on the aircraft type, the fixed wing segment is projected to grow at the highest CAGR during the forecast period

Based on aircraft type, fixed-wing segment is estimated to lead air-to-air refueling market during forecast period. A fixed wing aircraft attains flight using wings fixed to the fuselage to generate the necessary lift using the forward motion of the aircraft. The fixed wing aircraft segment is experiencing growth as it can be used for longer travel distances and have better aerodynamic structures than rotary wing aircraft. Fixed wing aircraft can also take flight in challenging conditions and environments.

“North America is projected to grow at the highest CAGR during the forecast period.”

North America is one of the leading markets for air-to-air refueling systems in terms of research and development activities, deployment, and the presence of key market players. The major countries under this region are the US and Canada. The US leads the air-to-air refueling market in North America. The military aviation sector in North America is growing steadily, consequently created a significant demand for air-to-air refueling systems. The presence of major players, OEMs, and component manufacturers are one of the key factors expected to boost the air-to-air refueling market in North America. The US is expected to drive the growth of the North American air-to-air refueling market. An increasing number of military aircraft upgrade programs, ongoing research and development of advanced military aircraft platforms, and the presence of major systems and components manufacturers are expected to lead to a surge in demand for air-to-air refueling systems in North America during the forecast period.

The break-up of profile of primary participants in the air-to-air refueling market:

By Company Type: Tier 1 – 49%, Tier 2 – 37%, and Tier 3 – 14%

By Designation: C Level – 55%, Director Level – 27%, and Others – 18%

By Region: North America – 55%, Europe – 27%, Asia Pacific – 9%, RoW – 9%

Major players operating in the air-to-air refueling market Cobham plc (UK), Eaton Corporation (US), Airbus (Netherlands), Boeing (US), and GE Aviation (US).among others.

#### Research Coverage:

This research report categorizes the air-to-air refueling market by component (pumps, valves, nozzles, hoses, boom, probes, fuel tanks, pods, and others), system (probe & drogue, boom refueling, and autonomous), aircraft type (fixed wing and rotary wing), type (manned and unmanned), end user (OEM and aftermarket) in these segments have been mapped across major regions, namely, North America, Europe, Asia Pacific, and the Rest of the World (the Middle East, Latin America, and Africa). The scope of the report covers detailed information regarding the major factors, such as drivers, restraints, challenges, and opportunities, influencing the growth of the air-to-air refueling market. A detailed analysis of the key industry players has been done to provide insights into their business overviews; solutions and services; key strategies; agreements, collaborations, new product launches, contracts, expansion, acquisitions, and partnerships associated with the air-to-air refueling market.

#### Reasons to buy this report:

The report will help the market leaders/new entrants in this market with information on the closest approximations of the revenue numbers for the overall air-to-air refueling market and the subsegments. This report will help stakeholders understand the competitive landscape and gain more insights to position their businesses better and to plan suitable go-to-market strategies. The report also helps stakeholders understand the pulse of the market and provides them with information on key market drivers, restraints, challenges, and opportunities.

The report provides insights on the following pointers:

**Market Penetration:** Comprehensive information on air-to-air refueling system offered by the top players in the market

**Product Development/Innovation:** Detailed insights on upcoming technologies, research & development activities, and new product & service launches in the air-to-air refueling market

**Market Development:** Comprehensive information about lucrative markets – the report analyzes the air-to-air refueling market across varied regions

**Market Diversification:** Exhaustive information about new products & services, untapped geographies, recent developments, and investments in the air-to-air refueling market

**Competitive Assessment:** In-depth assessment of market shares, growth strategies and service offerings of leading players in the air-to-air refueling market

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\*Details on Business Overview, Products & solutions Offered, Recent Developments, and MnM View (Key strengths/Right to Win, Strategic Choices Made, and Weaknesses and Competitive Threats) might not be captured in case of unlisted companies.

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