

Aircraft Electrification Market by Technology (More Electric, Hybrid Electric, Fully Electric), Component, Application, System, Platform (Commercial, Military, Business & General Aviation, UAV, AAM) and Region - Forecast to 2030

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Abstracts

The market for aircraft electrification is estimated to be USD 6.0 billion in 2021 and is projected to reach USD 20.0 billion by 2030, at a CAGR of 14.3% during the forecast period. The growth of this market is mainly driven by increase in adoption of cleaner and greener aircraft, developments in advanced air mobility and alternative sources of energy.

The aircraft electrification market includes major players like Honeywell International Inc. (US), Safran (France), Thales Group (France), Raytheon Technologies (US), GE Aviation (US). These players have spread their business across various countries including North America, Europe, Asia Pacific, Middle East, Africa, and Latin America. COVID-19 has impacted their businesses as well. Industry experts believe that COVID-19 could affect aircraft electrification production and services by 7–10% globally in 2020.

“Lithium-sulfur and lithium titanate batteries are fueling the battery segment which is projected to be the highest in the aircraft electrification market during the forecast period.”

Based on component, the battery segment is estimated to lead the market during the forecast period, with a share of 24.3% in 2021. Lithium-sulfur is one of the battery technologies competing to supersede lithium-ion as the major battery technology of the next generation. The ability of Li-S batteries to store and release energy offers an

opportunity to create batteries that hold as much as five times more charge than lithium for a given size and weight of the cell. Lithium titanate or lithium titanium oxide is a type of rechargeable battery, it can charge faster than other lithium-ion batteries but has a lower energy density.

“The hybrid electric segment is projected to witness the highest CAGR during the forecast period.”

Based on technology, the hybrid electric segment is projected to be the highest CAGR rate for the aircraft electrification market during the forecast period. Hybrid electric technology uses both airplane fuel as well as electricity to drive the propulsion system. This technology helps reduce fuel burn, energy consumption, emissions, and noise for single-aisle passenger aircraft. Solar-powered and fuel-powered are two types of power sources available in hybrid propulsion.

“The power generation segment is projected to witness the highest CAGR during the forecast period.”

Based on application, the power generation segment is projected to grow at the highest CAGR rate for the aircraft electrification market during the forecast period. In an aircraft, power is generated with the support of an integrated drive generator, a variable frequency generator, an auxiliary power unit, and an external ground power unit. In conventional aircraft, power is generated using mechanical hydraulic and pneumatic systems, while in advanced aircraft, power is generated by an electric generator. Key aircraft manufacturers prefer integrated drive generators over variable frequency generators in wide-body aircraft and very large aircraft, as these generators are more reliable and efficient.

“The business and general aviation segment is projected to witness the highest CAGR during the forecast period”

Based on platform, the business and general aviation segment is projected to grow at the highest CAGR rate for the aircraft electrification market during the forecast period. The growth of the business & general aviation segment of the market can be attributed to the increase in corporate profits, rise in the number of high-net-worth individuals, and an increase in the replacement demand for existing business jets with new ones.

“The propulsion system segment is projected to witness the highest CAGR during the forecast period”

Based on system, the propulsion system segment is projected to grow at the highest CAGR rate for the aircraft electrification market during the forecast period. Electrification of propulsion systems is expected to boost the power for take-off, thereby creating an efficient electrical replacement for a regular turbofan with a 2-megawatt liquid-cooled electric motor. Electrical propulsion systems are expected to reduce fuel burn substantially, leading to a decrease in atmospheric emissions.

“The North American market is projected to contribute the largest share from 2021 to 2030”

The key factor responsible for North America leading the aircraft electrification market is the high demand for new aircraft in the region. The growing upcoming projects, and the emergence of several startups supporting the electrification in the aviation industry are additional factors influencing the growth of the North American aircraft electrification market.

Breakdown of primaries The study contains insights from various industry experts, ranging from component suppliers to Tier 1 companies and OEMs. The break-up of the primaries is as follows:

By Company Type: Tier 1–39%; Tier 2–37%; and Tier 3–24%

By Designation: C Level–35%; Directors–27%; and Others–38%

By Region: North America–55%; Europe–27%; Asia Pacific–9%; and Rest of the World–9%

The aircraft electrification market is dominated by a few globally established players such as Honeywell International Inc. (US), Safran (France), Thales Group (France), Raytheon Technologies (US), GE Aviation (US).

Research Coverage

The study covers the aircraft electrification market across various segments and subsegments. It aims at estimating the size and growth potential of this market across different segments based on component, technology, application, platform, system and by region. This study also includes an in-depth competitive analysis of the key players in

the market, along with their company profiles, key observations related to their product and business offerings, recent developments undertaken by them, and key market strategies adopted by them.

Reasons to Buy this Report

This report is expected to help market leaders/new entrants with information on the closest approximations of the revenue numbers for the overall aircraft electrification market and its segments. This study is also expected to provide region-wise information about the end use, and what types of aircraft electrification components are used. This report aims at helping the stakeholders understand the competitive landscape of the market, gain insights to improve the position of their businesses and plan suitable go-to-market strategies. This report is also expected to help them understand the pulse of the market and provide them with information on key drivers, restraints, challenges, and opportunities influencing the growth of the market.

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