

Aircraft Heat Exchanger Market by Application (Environmental Control System and Engine System), Type (Plate-Fin, Flat Tube), Vendor (OEM, Aftermarket), Platform (Fixed-Wing Aircraft, Rotary-Wing Aircraft, and UAVS), and Region - Global Forecast to 2026

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Abstracts

“Increasing demand for effective heating and cooling in commercial aircrafts is driving the aircraft heat exchanger market.”

The aircraft heat exchanger market is expected to grow from an estimated USD 1.3 billion in 2021 to USD 2.0 billion by 2026, at a CAGR of 9.2% during the forecast period of 2021-2026. Some of the factors fueling the market's growth include increasing demand for effective cooling and heating in commercial aircrafts and increase in military spending in many countries worldwide. Airline carriers are focused on upgrading passenger luxury, which is encouraging the adoption of relaxed, highly customized, and superior aircraft heat exchangers to restore traditional systems. This is driving the expansion of the aftermarket sales sector in the aircraft heat exchangers market. The increasing demand of technological advancements in thermal management for military and aerospace sector seem to be a lucrative opportunity for aircraft heat exchanger market 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. When the COVID-19 pandemic started spreading in the world in February 2020, airlines businesses were among the first to feel the shock, as the pandemic had an immediate effect on travel need. The situation is still not normal and air traffic has not gone back to normal. Currently countries like India and Brazil have soaring cases of COVID-19, making 2021's first quarter suffer with regards to the business performance for aerospace and defense.

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

Based on vendor, the aircraft heat exchanger market has been segmented into OEM (Original Equipment Manufacturer) and aftermarket. The aftermarket segment includes maintenance, repairing upgrading and replacement of aircraft heat exchanger components and systems. The aftermarket vendor sub-segment is expected to lead the aircraft heat exchanger market due to high spending on upgraded avionics systems, and replacement of overused thermal management components and systems. However, increase in aircraft deliveries and domestic manufacturing of aircrafts will drive the growth of OEM segment

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

Based on platform, the aircraft heat exchanger market has been segmented into fixed-wing aircraft, rotary-wing aircraft, and Unmanned Aerial Vehicles (UAVs). Aircraft heat exchangers differ, in terms of application and configuration in different types of aircraft. They also differ in numbers for narrow body aircraft, wide body aircraft, very large body aircraft, and business jets. The fixed wing segment is expected to grow at the highest CAGR during the forecast period. Factors positively impacting the aircraft heat exchanger market with regards to this section are rising demand of narrow body commercial aircrafts and more connectivity across regions.

“Asia Pacific is projected to grow at the highest CAGR during the forecast period.”

Asia Pacific is one of the emerging markets for aircraft heat exchanger in terms of research and development activities, deployment, and the presence of some of the key market players. The major countries under this region are the Japan, India and China. The drivers for the growth of the aircraft heat exchanger market in Japan include the need to improve aircraft systems of the Japan Self-Defense Forces, including the Japan Air Self- Defense Force (JASDF), Japan Ground Self-Defense Force, and the rising

demand for better thermal management system in commercial airlines. Rising government focus on military and defense will boost market in India. China is one of the fastest-growing economies in the world. The country is expected to increase its military spending in aircraft systems, including Aircraft heat exchangers, as well as in modern military equipment to remain technologically advanced in the defense sector. Domestic airlines in China are increasingly engaged in contracts with aftermarket service suppliers to enhance their aircraft operations. Also, factors like cheap and high skilled personnel for manufacturing of aircraft heat exchangers is boosting the market in Asia Pacific region.

The break-up of profile of primary participants in the aircraft heat exchanger 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 aircraft heat exchanger market include Megitt PLC (Britain), AMETEK(US), TAT Technologies (Israel), Triumph Group (US) and Honeywell (US). These key players offer aircraft heat exchangers applicable for commercial or defense aircrafts, spacecrafts, UAV, UCAVs and have well-equipped and strong distribution networks across the North American, European, Asia Pacific, and the Rest of the World (the Middle East, Latin America, and Africa).

Research Coverage:

This research report categorizes the aircraft heat exchanger market based on design (plate and fin type and flat tube type) cooling method (oil cooled or air cooled), based on platform (fixed-wing aircraft, rotary-wing aircraft, and Unmanned Aerial Vehicles (UAVs)), based on application (Environment Control System(ECS), Engine system, Electronic Pod Cooling and Hydraulics) and end user (oem and aftermarket). 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 aircraft heat exchangers 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 aircraft heat exchanger 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 aircraft heat exchanger 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 aircraft heat exchanger 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 aircraft heat exchanger market

Market Development: Comprehensive information about lucrative markets – the report analyzes the aircraft heat exchanger market across varied regions

Market Diversification: Exhaustive information about new products & services, untapped geographies, recent developments, and investments in the aircraft heat exchanger market

Competitive Assessment: In-depth assessment of market shares, growth strategies and service offerings of leading players in the aircraft heat exchanger market

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