

Firefighting Aircraft - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts (2024 - 2029)

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Abstracts

The Firefighting Aircraft Market size is estimated at USD 7.28 billion in 2024, and is expected to reach USD 10.16 billion by 2029, growing at a CAGR of 6.89% during the forecast period (2024-2029).

Firefighting aircraft need large containers for liquid storage. These include tanks in the airplane hold area, external tanks, or a combination. The tank helps store water or any other retardant, which is used to extinguish the fire by dropping it from the aircraft. Increasingly, the higher severity and frequency of wildfires worldwide are driving the demand for technological advancements in firefighting aircraft in terms of increasing payload capacities and operational range.

Technological advances include increases in payload capacities, operational range, and accuracy of retardant deployment. Government investments in wildfire management and aerial firefighting fleets are driving the market. Some of the widely used firefighting aircraft are Boeing B747, McDonnell Douglas DC-10, and BAe 146 aerial firefighting aircraft.

The market's growth is hampered by challenges such as the high cost of operations, stringent regulatory standards for aviation safety, and environmental concerns over the chemicals used in fighting fires. The high cost of operations is among the severe challenges faced by the firefighting aircraft market, mainly attributed to higher fuel costs, maintenance costs, and specialized equipment requirements.

Firefighting Aircraft Market Trends

The Rotorcraft Segment will Dominate the Market During the Forecast Period

A wide range of helicopters are selected for firefighting missions based on cost-effectiveness and suitability. Compared to fixed-wing aircraft, rotorcrafts can carry less water or fire retardant and transport fewer firefighters and equipment. Helicopters are helpful for quick initial attacks on smaller wildfires. The new technological developments have improved operational efficiency and made them safer and more reliable. The lift capacity has increased, and advanced water drop systems and enhanced flight control systems have been installed to increase their effectiveness in firefighting missions. Furthermore, incorporating advanced coordination and communication technologies enables better integration of aerial efforts with ground operations, ensuring an improvement in overall firefighting strategies.

Various countries are converting helicopters into firefighters by installing modern internal water tanks. In March 2023, United Rotorcraft started evaluating several options and modernizations for the emergency rescue and firefighting helicopter program. The upgrades included a 1,000-gallon composite water tank, which the company developed in collaboration with Dart. Furthermore, in November 2023, Leonardo signed a contract with Omni Helicopters International to supply AW189 and A189 K helicopters to enhance firefighting capabilities. These high-efficiency, extended-endurance helicopters will improve the operational effectiveness of firefighting missions within the region. The deal aligns with OHI Helicopters International's focus on sustainability and reliability in firefighting operations.

North America Projected to Hold the Highest Market Share During the Forecast Period

North America is projected to hold the highest market share during the forecast period. Wildfires are prevalent in North American countries such as the United States and Canada. They may be caused by natural causes such as lightning or human activity, such as faulty electrical equipment, unextinguished smoking materials, overheating automobiles, or arson. The US National Interagency Fire Center report stated that around 55,571 wildfire incidents occurred in 2023. Similarly, Canada reported 6,132 incidents of wildfires that affected an area of 16.5 million hectares of land in the same year.

Wildfire control agencies in the region use different types of firefighting aircraft, such as Large Airtankers (LATs), Single Engine Airtankers (SEATs), Very Large Airtankers (VLATs), Smokejumpers, and Water Scoopers. In a nutshell, high technological

capabilities, strong government support, and a high number of wildfires help the region account for the largest share of the global firefighting market. The dominance is supported by ongoing advancements in aircraft technology and strategic initiatives aimed at improving the effectiveness of wildfire management.

For instance, in April 2024, the Saskatchewan Public Agency announced plans to invest approximately USD 187 million in procuring four repurposed air tankers. The federal government has contributed USD 16 million to support the investment, which underlines a growing commitment to updating and modernizing aerial firefighting fleets.

Firefighting Aircraft Industry Overview

The firefighting aircraft market is consolidated, with a few players holding significant shares in the market. Some of the key players in the market are Lockheed Martin Corporation, Airbus SE, Leonardo SpA, Textron Inc., and Air Tractor Inc. Key players are making strategic moves by forming joint ventures and partnerships. The key OEMs are focusing on expanding their global market presence through alliances. For instance, in January 2024, Airbus (France) and Tata Group (India) partnered for a final assembly line for the H125 Helicopter. The partnership emphasizes strengthening ties between India and France in the aerospace industry. These moves will enhance aircraft capabilities and increase key players' operational footprint in the global market.

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Contents

1 INTRODUCTION

- 1.1 Study Assumptions
- 1.2 Scope of the Study

2 RESEARCH METHODOLOGY

3 EXECUTIVE SUMMARY

4 MARKET DYNAMICS

- 4.1 Market Overview
- 4.2 Market Driver
- 4.3 Market Restraint
- 4.4 Porter's Five Forces Analysis
 - 4.4.1 Bargaining Power of Suppliers
 - 4.4.2 Bargaining Power of Buyers/Consumers
 - 4.4.3 Threat of New Entrants
 - 4.4.4 Threat of Substitute Products
 - 4.4.5 Intensity of Competitive Rivalry

5 MARKET SEGMENTATION

- 5.1 Aircraft Type
 - 5.1.1 Rotorcraft
 - 5.1.2 Fixed-wing
- 5.2 Maximum Take-off Weight
 - 5.2.1 Below 50,000 kg
 - 5.2.2 Above 50,000 kg
- 5.3 Geography
 - 5.3.1 North America
 - 5.3.2 Europe
 - 5.3.3 Asia-Pacific
 - 5.3.4 Latin America
 - 5.3.5 Middle East and Africa

6 COMPETITIVE LANDSCAPE

6.1 Vendor Market Share

6.2 Company Profiles

6.2.1 Lockheed Martin Corporation

6.2.2 Viking Air Ltd

6.2.3 ShinMaywa Industries Ltd

6.2.4 MD Helicopters Inc.

6.2.5 Textron Inc.

6.2.6 Kaman Corporation

6.2.7 Airbus SE

6.2.8 Leonardo SpA

6.2.9 Hynaero

6.2.10 Air Tractor Inc.

6.2.11 De Havilland Aircraft of Canada Limited

7 MARKET OPPORTUNITIES AND FUTURE TRENDS

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