

Aircraft Auxiliary Power Unit (APU) Market Forecasts to 2032 - Global Analysis By Technology Type (Conventional Gas Turbine APUs, Electric/Battery-Powered APUs, Hybrid-Electric APUs, and Fuel-Cell Based APUs), Aircraft Platform, Aircraft Type, Power Rating, Component, Sales Channel, and By Geography

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Abstracts

According to Statistics MRC, the Global Aircraft Auxiliary Power Unit (APU) Market is accounted for \$6.3 billion in 2025 and is expected to reach \$13.8 billion by 2032, growing at a CAGR of 11.7% during the forecast period. The aircraft Auxiliary Power Unit (APU) includes small onboard gas turbines that supply electrical power and compressed air when main engines are not operating. It supports commercial, military, and business aircraft operations. Growth is driven by increasing global aircraft fleets, airport congestion requiring independent ground power, demand for passenger comfort systems, stricter turnaround time targets, and upgrades to more fuel-efficient and low-emission APU technologies.

Market Dynamics:

Driver:

Increasing aircraft deliveries, particularly in commercial aviation

Major carriers are aggressively expanding their fleets to accommodate the resurgence in global passenger traffic, necessitating a commensurate supply of line-fit APU units. This trend is particularly evident in the commercial sector, where the push for

modernization drives the integration of advanced auxiliary units that offer superior reliability. Furthermore, the rising demand for low-cost carriers in emerging markets ensures a steady pipeline for manufacturers. Consequently, the correlation between OEM output and APU procurement remains a cornerstone of industry growth.

Restraint:

Weight penalty, which impacts aircraft fuel efficiency

Every additional kilogram of empty weight directly increases the lift-induced drag and subsequent fuel consumption throughout the flight envelope. This "weight penalty" is a critical concern for long-haul flights, where the deadweight of the APU competes with payload capacity and fuel reserves. Additionally, the requirement for dedicated structural support and fuel lines adds further complexity and mass. As airlines strive to meet net-zero targets, the parasitic nature of carrying a non-propulsive engine often acts as a deterrent to larger installations.

Opportunity:

Retrofitting older aircraft fleets with newer, more efficient APU models

Many legacy aircraft operate with outdated APU models that lack the fuel efficiency and noise reduction capabilities of modern counterparts. By upgrading to next-generation units, operators can achieve significant reductions in ground-level emissions and operational expenses. Moreover, the integration of digital health monitoring in newer models allows for predictive maintenance, further enhances aircraft availability. This modernization trend is particularly strong in North America and Europe, where environmental regulations are increasingly stringent regarding ramp operations.

Threat:

Competition from ground power units (GPU) and pre-conditioned air (PCA) carts

To cut down on noise and air pollution in the area, many international airports now require the use of electric ground power. This means that airlines have to turn off their APUs while they are at the gate. This shift toward "green gates" significantly reduces the operational hours of onboard APUs, thereby lowering the demand for replacements and consumables. Furthermore, as GPUs become more efficient and widely available, the necessity of running an onboard turbine for electrical power diminishes. This

transition threatens the long-term utilization rates of auxiliary power systems.

Covid-19 Impact:

The pandemic caused a catastrophic disruption in the APU market, primarily through the grounding of nearly 60% of the global commercial fleet. With flight cycles plummeting, the demand for maintenance, repair, and overhaul services vanished almost overnight, as parked aircraft required minimal auxiliary power. Supply chain bottlenecks further delayed the delivery of critical components, leading to a massive backlog in new installations. Although the market has largely recovered by 2026, the financial strain forced many airlines to defer non-essential retrofits and upgrades permanently.

The conventional gas turbine APUs segment is expected to be the largest during the forecast period

The conventional gas turbine APUs segment is expected to account for the largest market share during the forecast period due to its proven reliability and high power-to-weight ratio. These units remain the industry standard for providing the high-pressure bleed air required for main engine starting and cabin environmental control. While alternative architectures are emerging, the established infrastructure for gas turbine maintenance and the lack of certified high-capacity battery alternatives ensure their continued dominance. Furthermore, the maturity of this technology provides a level of operational certainty that is essential for commercial airlines. Their widespread adoption across all aircraft classes reinforces this market lead.

The aftermarket segment is expected to have the highest CAGR during the forecast period

Over the forecast period, the aftermarket segment is predicted to witness the highest growth rate as the global fleet ages and flight hours increase. The demand for spare parts, component repairs, and full engine overhauls is surging as airlines prioritize the reliability of their existing assets. Additionally, the integration of advanced sensors allows for more sophisticated maintenance programs, driving a shift from reactive to proactive servicing. The high cost of new aircraft has also led many operators to invest heavily in maintaining their current APU inventory.

Region with largest share:

During the forecast period, the North America region is expected to hold the largest market share. This dominance is supported by the presence of major aircraft manufacturers and a massive existing fleet of commercial and military aircraft. The region's advanced MRO infrastructure and early adoption of next-generation APU technologies further solidify its position. Moreover, the high volume of domestic air travel necessitates constant maintenance and replacement cycles.

Region with highest CAGR:

Over the forecast period, the Asia Pacific region is anticipated to exhibit the highest CAGR. This rapid growth is fueled by the unprecedented expansion of the middle class in China and India, leading to a surge in low-cost carrier activity. Additionally, the development of regional aircraft manufacturing hubs and heavy investments in airport infrastructure are driving new APU orders. The regional focus on fleet modernization also contributes to this accelerated growth trajectory.

Key players in the market

Some of the key players in Aircraft Auxiliary Power Unit (APU) Market include Honeywell International Inc., Safran SA, RTX Corporation, Rolls-Royce plc, PBS Group a.s., JSC SPE Aerosila, Technodinamika, Motor Sich JSC, Hanwha Aerospace Co., Ltd., Bet Shemesh Engines Ltd., Eaton Corporation plc, and Liebherr-International AG.

Key Developments:

In November 2025, Aerosila received a Type Certificate for the AV112 114 propeller system, part of its broader portfolio that includes auxiliary gas turbine engines for APUs.

In October 2025, Safran Electrical & Power expanded its APU generator MRO partnership with Lufthansa Technik for Airbus A320 family aircraft, enhancing maintenance reliability.

In September 2025, Pratt & Whitney signed a 15 year maintenance contract with Singapore Airlines for APS5000 APUs on Boeing 787 Dreamliners, ensuring long term reliability.

Technology Types Covered:

Conventional Gas Turbine APUs

Electric/Battery-Powered APUs

Hybrid-Electric APUs

Fuel-Cell Based APUs

Aircraft Platforms Covered:

Commercial Aviation

Military Aviation

General & Business Aviation

Unmanned Aerial Vehicles (UAVs)

Aircraft Types Covered:

Fixed-Wing Aircraft

Rotary-Wing Aircraft

Power Ratings Covered:

Low Power (150 kVA)

Components Covered:

Power Section

Accessory Gearbox

Load Compressor & Pneumatic Systems

Control and Monitoring Systems

Exhaust and Inlet Systems

Lubrication and Fuel Systems

Sales Channels Covered:

OEM (Line-fit)

Aftermarket

Regions Covered:

North America

US

Canada

Mexico

Europe

Germany

UK

Italy

France

Spain

Rest of Europe

Asia Pacific

Japan

China

India

Australia

New Zealand

South Korea

Rest of Asia Pacific

South America

Argentina

Brazil

Chile

Rest of South America

Middle East & Africa

Saudi Arabia

UAE

Qatar

South Africa

Rest of Middle East & Africa

What our report offers:

Aircraft Auxiliary Power Unit (APU) Market Forecasts to 2032 - Global Analysis By Technology Type (Conventiona...

- Market share assessments for the regional and country-level segments
- Strategic recommendations for the new entrants
- Covers Market data for the years 2024, 2025, 2026, 2028, and 2032
- Market Trends (Drivers, Constraints, Opportunities, Threats, Challenges, Investment Opportunities, and recommendations)
- Strategic recommendations in key business segments based on the market estimations
- Competitive landscaping mapping the key common trends
- Company profiling with detailed strategies, financials, and recent developments
- Supply chain trends mapping the latest technological advancements

Free Customization Offerings:

All the customers of this report will be entitled to receive one of the following free customization options:

Company Profiling

Comprehensive profiling of additional market players (up to 3)

SWOT Analysis of key players (up to 3)

Regional Segmentation

Market estimations, Forecasts and CAGR of any prominent country as per the client's interest (Note: Depends on feasibility check)

Competitive Benchmarking

Benchmarking of key players based on product portfolio, geographical presence, and strategic alliances

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