

# **Aerial Refueling Systems Market by Aircraft Type (Combat Aircraft, Helicopter, and UAV), by System Type (Probe and Drogue, and Boom and Receptacle), by Component Type (Refueling Pods, Refueling Probes, Drogues, Hoses, Boom, and Others), by End-User Type (OE and Aftermarket), and by Region (North America, Europe, Asia-Pacific, and Rest of the World), Trend, Forecast, Competitive Analysis, and Growth Opportunity: 2019-2024**

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## **Abstracts**

This strategic assessment report, from Stratview Research, estimates the global aerial refueling systems market for the forecast period of 2019 to 2024 by studying current market trends, changing competitive dynamics, and future market possibilities. The report provides detailed insights into the market dynamics to enable informed business decision making and growth strategy formulation based on the opportunities present in the market.

### **Aerial Refueling Systems Market: Highlights**

As per Stratview Research, the global aerial refueling systems market offers a healthy growth opportunity in the entire ecosystem and is likely to reach an estimated value of US\$ 671.9 million in 2024. Increasing demand for tanker aircraft, owing to rising defense budgets in the developing economies and expected replacement of old tanker aircraft fleet of KC-135 in the USA, emergence of multirole aircraft tankers; increasing demand for long-run military jets for special purpose missions, and rising tanker fleet size are the major growth drivers for the aerial refueling systems market.

The USA, the largest market for the defense industry, has a large aging tanker fleet which needs replacement with the latest tanker aircraft. The USA's current plan is to purchase 179 Boeing's KC-46 tanker aircraft by 2027 and will eventually replace 470 KC-135 tanker aircraft with KC-46 aircraft. In Sep. 2018, the US Air Force gave a contract of about US\$ 2.9 billion to Boeing for 18 additional KC-46 Pegasus tanker aircraft, making the total order of 52 aircraft. Later in Jan. 2019, Boeing successfully delivered its first KC-46A Pegasus tanker aircraft to the US Air Force.

The market is segmented based on the aircraft type as Combat Aircraft, Helicopter, and UAV. Combat aircraft is likely to remain the growth engine of the market during the forecast period. Increasing demand for combat aircraft, owing to rising tensions, and large aging combat aircraft fleet size and a greater need of multiple tanker aircraft for refueling are the major factors that are proliferating the demand for refueling systems in the segment. The UAV segment is likely to witness the highest growth during the forecast period, driven by increasing production of long-range UAVs.

Based on the system type, the market is segmented as Hose & Drogue and Boom & Receptacle. Hose & Drogue is expected to remain the larger and faster-growing system type in the market during the forecast period of 2019 to 2024, driven by low cost and ease in refueling. All the major tanker aircraft are increasingly opting for hose and drogue system. KC-46 tanker aircraft of Boeing, the most talked tanker aircraft, are equipped with a permanent centerline drogue system and removable wing air refueling pods.

In terms of region, North America is expected to remain the largest aerial refueling systems market during the forecast period. The USA is likely to remain the growth engine of the North American market, propelled by high defense budget, large tanker aircraft fleet (KC-135), and expected replacement of old aircraft fleet with new KC-46 tanker aircraft in the coming years.

Asia-Pacific is expected to experience the highest growth during the same period. Increasing defense budget of the major Asian markets, such as China, India, Japan, and South Korea; and good order size of tanker aircraft are likely to drive the demand for aerial refueling systems in the region.

The supply chain of this market comprises raw material suppliers, component manufacturers, aerial refueling system suppliers, aircraft manufacturers, and end users. The key aerial refueling system manufacturers are Cobham Plc., Eaton Corporation,

Safran S.A. (Zodiac Aerospace), GE Aviation Systems, and Marshall Aerospace and Defense Group. Developing high-performance aerial refueling systems and components and building long-term relations with the customers are the key strategies adopted by the major players to gain a competitive edge in the market.

## Research Methodology

This report offers high-quality insights and is the outcome of detailed research methodology comprising extensive secondary research, rigorous primary interviews with industry stakeholders and validation and triangulation with Stratview Research's internal database and statistical tools. More than 500 authenticated secondary sources, such as company annual reports, fact book, press release, journals, investor presentation, white papers, patents, and articles, have been leveraged to gather the data. About 10 detailed primary interviews with the market players across the value chain in all four regions and industry experts have been executed to obtain both qualitative and quantitative insights.

## Report Features

This report provides market intelligence in the most comprehensive way. The report structure has been kept such that it offers maximum business value. It provides critical insights into the market dynamics and will enable strategic decision making for the existing market players as well as those willing to enter the market. The following are the key features of the report:

- Market structure: Overview, industry life cycle analysis, supply chain analysis
- Market environment analysis: Growth drivers and constraints, Porter's five forces analysis, SWOT analysis
- Market trend and forecast analysis
- Market segment trend and forecast
- Competitive landscape and dynamics: Market share, product portfolio, product launches, etc.
- Attractive market segments and associated growth opportunities
- Emerging trends
- Strategic growth opportunities for the existing and new players
- Key success factors

The global aerial refueling systems market is segmented into the following categories:

## Aerial Refueling Systems Market, by Aircraft Type

*Aerial Refueling Systems Market by Aircraft Type (Combat Aircraft, Helicopter, and UAV), by System Type (Probe...*

Combat Aircraft (Regional Analysis: North America, Europe, Asia-Pacific, and RoW)  
Helicopter (Regional Analysis: North America, Europe, Asia-Pacific, and RoW)  
UAV (Regional Analysis: North America, Europe, Asia-Pacific, and RoW)  
Aerial Refueling Systems Market, by System Type

Hose and Drogue (Regional Analysis: North America, Europe, Asia-Pacific, and RoW)  
Boom and Receptacle (Regional Analysis: North America, Europe, Asia-Pacific, and RoW)  
Aerial Refueling Systems Market, by Component Type

Refueling Pods (Regional Analysis: North America, Europe, Asia-Pacific, and RoW)  
Refueling Probes (Regional Analysis: North America, Europe, Asia-Pacific, and RoW)  
Drogues (Regional Analysis: North America, Europe, Asia-Pacific, and RoW)  
Hoses (Regional Analysis: North America, Europe, Asia-Pacific, and RoW)  
Boom (Regional Analysis: North America, Europe, Asia-Pacific, and RoW)  
Others (Regional Analysis: North America, Europe, Asia-Pacific, and RoW)  
Aerial Refueling Systems Market, by End-User Type

OE (Regional Analysis: North America, Europe, Asia-Pacific, and RoW)  
Aftermarket (Regional Analysis: North America, Europe, Asia-Pacific, and RoW)  
Aerial Refueling Systems Market, by Region

North America (Country Analysis: The USA, and Rest of North America)  
Europe (Country Analysis: Germany, France, The UK, Russia, and Rest of Europe)  
Asia-Pacific (Country Analysis: China, Japan, India and Rest of Asia-Pacific)  
Rest of the World (Country Analysis: Latin America, The Middle East, and Others)  
Report Customization Options

With this detailed report, Stratview Research offers one of the following free customization options to our respectable clients:

#### Company Profiling

Detailed profiling of additional market players (up to three players)  
SWOT analysis of key players (up to three players)  
Regional Segmentation

Current market size (2018) of aerial refueling systems in any of the North American

country by system type  
Competitive Benchmarking

Benchmarking of key players on the following parameters: Product portfolio,  
geographical reach, regional presence, and strategic alliances

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