

# **Aircraft Refueling Hose Market – Global Industry Size, Share, Trends, Opportunity, and Forecast, 2018-2028 Segmented By Type (Composite Hose, Stainless Steel Hose, Rubber Hose), Application (Helicopters, Military Aircraft, Unmanned Aerial Vehicle (UAV), Commercial Aircraft), Sales Channel (Original Equipment Manufacturer (OEM), Aftermarket) By Region, By Competition.**

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## **Abstracts**

Global Aircraft Refueling Hose Market has valued at USD 3 billion in 2022 and is anticipated to project robust growth in the forecast period with a CAGR of 10.7% through 2028. The global demand for commercial airplanes is boosted by the expansion of the tourism sector, and this is what fuels the market for aircraft refueling hose. The expansion of the tourism industry also helps to drive up demand for helicopters. The increased use of helicopters in a variety of industries, including mining, oil, and gas, as well as the installation of refueling hoses for higher fuel flow assurance and increased reliability, are additional driving forces the market's expansion. Additionally, it is projected that factors like increased defense spending worldwide and the need for militaries to operate more effectively would support the expansion of the airplane refueling hose market soon. Moreover, increasing commercial vehicle traffic brought on by the sharp increase in air passenger travel is anticipated to have a positive impact. Over the anticipated timeframe, the market for airplane refueling hoses is expected to grow due to rising aircraft production brought driven by rising air passenger traffic and expanding global defense budgets. A large decrease of flight route downtime and the ease with which these systems may readily refuel airplanes on ground and even in the air during a flight are other factors that promote the industry's size expansion over the

anticipated time period.

## Key Market Drivers

### Increasing Air Travel Demand

The global aviation industry has witnessed a significant increase in air travel demand over the years. Factors such as rising disposable incomes, urbanization, and globalization have led to more people traveling by air. According to the International Air Transport Association (IATA), before the COVID-19 pandemic, the number of air passengers was consistently growing by approximately 5% annually. Although the pandemic temporarily disrupted this trend, the demand for air travel is expected to rebound as vaccination efforts progress and travel restrictions ease.

The growing air travel demand directly impacts the aircraft refueling hose market. More passengers and cargo require more aircraft in operation, which, in turn, necessitates efficient refueling systems. Aircraft refueling hoses play a critical role in ensuring the quick and safe transfer of fuel, making them indispensable in this context.

### Expanding Commercial Aviation Sector

The commercial aviation sector is a major driver of the aircraft refueling hose market. Airlines worldwide continuously expand their fleets to meet growing passenger and cargo demand. This expansion often involves the acquisition of new aircraft, many of which require advanced refueling systems. Modern commercial airplanes are designed for increased fuel efficiency, longer ranges, and higher passenger capacities. As a result, they often come equipped with advanced fueling technologies that require specialized hoses.

Aircraft manufacturers and airlines seek innovative solutions that enhance refueling efficiency and minimize downtime on the ground. Consequently, there is a growing demand for high-quality, durable, and technologically advanced refueling hoses that can meet the specific requirements of these modern aircraft.

### Military Aircraft Modernization

In addition to the commercial sector, military aviation also contributes significantly to the aircraft refueling hose market. Military aircraft, such as fighter jets, cargo planes, and helicopters, require reliable and efficient refueling systems. With advancements in

military aviation technology, many countries are modernizing their air forces by acquiring new aircraft and upgrading existing ones.

Modern military aircraft are often equipped with specialized refueling systems, including probe-and-drogue or boom refueling, to extend their operational range and capabilities. These systems rely on high-quality hoses to ensure safe and rapid refueling during missions. As a result, the modernization and expansion of military aircraft fleets worldwide create a steady demand for advanced refueling hose solutions.

### Stringent Safety Regulations

Safety is paramount in the aviation industry, and it extends to all aspects of aircraft operations, including refueling. Stringent safety regulations and standards are enforced globally to ensure the safe handling of aviation fuels and the equipment used in refueling operations.

Aircraft refueling hoses must comply with various international safety standards, including those set by organizations such as the International Civil Aviation Organization (ICAO), the Federal Aviation Administration (FAA), and the European Aviation Safety Agency (EASA). Compliance with these standards is mandatory for manufacturers and operators, driving the demand for hoses that meet or exceed these rigorous safety requirements.

### Environmental Concerns and Fuel Efficiency

Environmental concerns have become increasingly prominent in the aviation industry. Aircraft are under pressure to reduce their carbon emissions and improve fuel efficiency. In response to these concerns, manufacturers have developed more fuel-efficient engines and airframes, leading to the adoption of advanced fueling technologies.

Aircraft refueling hoses play a role in enhancing fuel efficiency by minimizing fuel spillage and ensuring efficient fuel transfer. Innovations in hose design, materials, and technology contribute to reducing fuel wastage during refueling operations. As airlines and aviation authorities prioritize sustainability, the demand for environmentally friendly and fuel-efficient refueling hoses is expected to rise.

### Technological Advancements in Hose Design

Technological advancements have significantly impacted the aircraft refueling hose market. New materials, manufacturing processes, and design innovations have led to the development of hoses that offer improved performance, durability, and safety.

For instance, the use of composite materials in hose construction has reduced weight and increased durability, making hoses more resistant to wear and tear. Additionally, advanced hose designs incorporate features like anti-static properties, flame resistance, and self-sealing mechanisms to enhance safety during refueling operations.

Furthermore, the integration of digital monitoring and sensor technologies into refueling hoses allows for real-time monitoring of fuel flow, pressure, and temperature. This data can help operators detect and address potential issues promptly, improving overall safety and efficiency. These technological advancements drive market growth as manufacturers continually strive to offer cutting-edge solutions to meet the evolving needs of the aviation industry.

### Infrastructure Development and Expansion

The expansion and development of airports and refueling infrastructure worldwide contribute to the growth of the aircraft refueling hose market. As air travel demand increases, airports are expanding their capacity to accommodate more aircraft. This expansion often includes the construction of new fueling facilities and the upgrading of existing ones.

With the installation of modern refueling systems, airports require compatible hoses that can handle higher flow rates and withstand the rigors of frequent use. Furthermore, the expansion of airports in emerging markets and the renovation of aging infrastructure in mature markets present opportunities for hose manufacturers to supply advanced, reliable, and efficient refueling hose solutions.

### Key Market Challenges

#### Regulatory Compliance and Certification

One of the most critical challenges in the aircraft refueling hose market is ensuring compliance with stringent aviation regulations and obtaining necessary certifications. Regulatory bodies such as the International Civil Aviation Organization (ICAO), the Federal Aviation Administration (FAA), the European Union Aviation Safety Agency (EASA), and various national aviation authorities set strict standards for aviation

equipment, including refueling hoses. Manufacturers must invest substantial resources in research, development, and testing to ensure that their hoses meet these rigorous standards. These standards cover factors such as material specifications, safety features, durability, and performance characteristics. The process of obtaining certification can be time-consuming and costly, adding complexity to product development and market entry. Moreover, complying with regulations requires manufacturers to stay updated on evolving industry standards and adapt their products accordingly. Any deviations from compliance can lead to costly recalls, legal liabilities, and damage to a company's reputation.

### Material Selection and Durability

Selecting appropriate materials for aircraft refueling hoses is a constant challenge. These hoses must withstand extreme conditions, including exposure to aviation fuels, varying temperatures, and physical stress during handling and operation. The choice of materials directly impacts hose durability, safety, and maintenance requirements. Traditional materials like rubber have been widely used in hose construction, but they have limitations in terms of resistance to fuel and environmental factors. The industry is increasingly turning to advanced materials, such as composite materials and specialty polymers, to improve hose durability and longevity. However, selecting the right material involves trade-offs. Composite materials may offer superior chemical resistance but can be more expensive. Specialty polymers can provide excellent durability but may have limited flexibility. Manufacturers must strike a balance between material properties, cost-effectiveness, and compliance with regulatory requirements.

### Product Innovation and Technological Advancements

Keeping pace with technological advancements and innovating in hose design and manufacturing is a constant challenge for market players. As aircraft technology evolves to become more fuel-efficient and environmentally friendly, refueling systems and hoses must adapt accordingly. Innovations in hose design involve developing solutions that can handle higher flow rates, reduce weight, and enhance safety features. For example, the integration of sensors and digital monitoring technology allows for real-time data collection, helping operators detect and address issues during refueling operations. Manufacturers also face the challenge of aligning their products with emerging aviation trends, such as electric aircraft. Electric aircraft may require specialized hoses for transferring different types of fluids, such as cooling fluids for batteries or hydrogen for fuel cells. Adapting to these new requirements while maintaining safety and compliance can be a complex process.

## Price Competition and Cost Pressures

Price competition is a pervasive challenge in the aircraft refueling hose market. With numerous manufacturers competing for contracts, price pressures can lead to slim profit margins. Buyers, including airlines and military organizations, often prioritize cost-efficiency in their procurement decisions. Manufacturers must balance the need to offer competitive pricing with the requirement to invest in research, development, and compliance efforts. Lowering prices too aggressively can result in reduced product quality or compromised safety features. Striking the right balance between affordability and quality is essential to remaining competitive in the market. Additionally, fluctuations in the prices of raw materials, such as specialty polymers and metals, can impact production costs. Manufacturers must manage these cost fluctuations to maintain profitability and pricing stability.

## Global Supply Chain Disruptions

Global supply chain disruptions, whether due to natural disasters, geopolitical tensions, or unexpected events like the COVID-19 pandemic, pose significant challenges for the aircraft refueling hose market. The aviation industry relies on a complex and interconnected supply chain that spans the globe. Disruptions in the supply chain can lead to delays in production, shortages of critical components, and increased lead times. These challenges can affect manufacturers' ability to meet customer demand and fulfill contractual obligations. To mitigate these risks, many companies have started diversifying their supply chains, identifying alternative suppliers, and increasing their stockpiles of essential components. However, these strategies can also increase costs and complicate supply chain management.

## Environmental Concerns and Sustainability

Environmental concerns are becoming increasingly prominent in the aviation industry, and they extend to the materials and practices used in aircraft refueling hoses. Sustainability is a challenge that manufacturers must address to align with industry trends and regulatory expectations. The aviation sector is actively seeking ways to reduce its carbon footprint and minimize environmental impact. This includes exploring alternative fuels, improving fuel efficiency, and adopting eco-friendly materials and practices throughout the supply chain. Manufacturers of aircraft refueling hoses must consider the environmental impact of their products, from material selection to production processes. This includes efforts to reduce waste, energy consumption, and

emissions associated with hose manufacturing. Developing sustainable and recyclable materials for hoses is also a focus area. Meeting these sustainability goals while maintaining the necessary performance and safety standards can be a complex and costly endeavor for manufacturers.

### Global Economic Uncertainty

Global economic uncertainty and market volatility can have a profound impact on the aircraft refueling hose market. Economic downturns, such as the global financial crisis of 2008 and the COVID-19 pandemic, have led to reduced air travel demand and delayed aircraft orders.

During economic downturns, airlines and military organizations may cut back on capital expenditures and defer equipment upgrades and replacements. This directly affects the demand for aircraft refueling hoses, as fewer new aircraft are introduced into service.

Manufacturers in this market must be prepared to adapt to fluctuating market conditions, diversify their customer base, and implement cost-saving measures to weather economic challenges.

### Key Market Trends

#### Increasing Demand for Lightweight and High-Performance Hoses

A notable trend in the aircraft refueling hose market is the growing demand for lightweight hoses that offer high performance. The aviation industry is constantly seeking ways to reduce the weight of aircraft to improve fuel efficiency and reduce emissions. As a result, manufacturers are developing and introducing advanced materials and construction techniques to produce hoses that are both durable and lightweight.

Composite materials, such as carbon fiber-reinforced composites and advanced polymers, are increasingly being used in hose construction. These materials provide the necessary strength and durability while significantly reducing the weight of the hoses. Lighter hoses contribute to fuel savings during aircraft operations and reduce the overall environmental footprint of aviation.

In addition to weight reduction, there is a continuous focus on enhancing the performance of aircraft refueling hoses. This includes improvements in flow rates,

pressure capabilities, and resistance to abrasion and wear. High-performance hoses ensure quick and efficient refueling, reducing ground time for aircraft and improving overall operational efficiency.

### Integration of Smart and Connected Technologies

The integration of smart and connected technologies into aircraft refueling hoses is a growing trend that offers numerous benefits. These technologies enable real-time monitoring, data collection, and remote diagnostics, enhancing the safety and efficiency of refueling operations.

Smart hoses are equipped with sensors and monitoring systems that can track parameters such as fuel flow rates, pressure, temperature, and hose integrity. This data can be transmitted to ground operators and maintenance teams, allowing them to closely monitor refueling processes and detect any irregularities or potential issues promptly. Connected hoses can be part of a larger aviation network, allowing for centralized monitoring and control. Ground crews and maintenance personnel can access data from multiple hoses and refueling operations simultaneously, improving oversight and operational coordination.

Moreover, smart hoses can facilitate predictive maintenance, enabling operators to schedule maintenance tasks based on actual usage and wear patterns. This reduces downtime and maintenance costs, contributing to overall cost-effectiveness.

### Sustainable Materials and Eco-Friendly Practices

The aviation industry, including the aircraft refueling hose segment, is increasingly embracing sustainability and eco-friendly practices. Environmental concerns and regulatory pressures are driving the adoption of sustainable materials and manufacturing processes. Manufacturers are actively researching and developing eco-friendly materials for hose construction. These materials may be recyclable, bio-based, or produced with reduced environmental impact. The goal is to reduce the environmental footprint associated with the production and disposal of hoses. Furthermore, sustainable manufacturing practices are being implemented to minimize waste, energy consumption, and emissions during hose production. This aligns with broader industry efforts to reduce greenhouse gas emissions and mitigate the environmental impact of aviation.

The use of sustainable materials and practices not only satisfies regulatory



requirements but also aligns with the environmental priorities of airlines, military organizations, and other aviation stakeholders. Companies that embrace sustainability can enhance their market appeal and competitiveness.

### Increased Focus on Safety and Compliance

Safety remains a paramount concern in aviation, and this focus extends to all aspects of aircraft operations, including refueling. The aircraft refueling hose market is witnessing a growing emphasis on safety and compliance with stringent regulations and industry standards. Hoses must meet rigorous safety and performance standards set by organizations such as the International Civil Aviation Organization (ICAO), the Federal Aviation Administration (FAA), and the European Union Aviation Safety Agency (EASA). Manufacturers invest substantial resources in research, development, and testing to ensure that their hoses meet these standards. Safety features, such as flame resistance, anti-static properties, and self-sealing mechanisms, are increasingly integrated into hose designs. These features mitigate the risks associated with fuel transfer operations and enhance the overall safety of refueling processes. Moreover, training and certification programs for operators and maintenance personnel are becoming more widespread. Ensuring that those responsible for handling and maintaining refueling hoses are well-trained contributes to safer and more reliable operations.

### Growing Demand for Customization and Specialized Solutions

As the aviation industry continues to evolve, there is a growing demand for customized and specialized solutions in the aircraft refueling hose market. Aircraft manufacturers, airlines, and military organizations often require hoses that meet specific operational and performance requirements. Customization may involve adapting hose dimensions, materials, and connection interfaces to fit the unique needs of different aircraft types. For example, military aircraft may require specialized refueling hoses to accommodate probe-and-drogue or boom refueling systems. The demand for specialized solutions also extends to hoses designed for specific fuels or fluids. With the exploration of alternative aviation fuels such as hydrogen and the increasing use of electric aircraft, hose manufacturers may need to develop hoses tailored to these emerging technologies.

Additionally, customization may involve the incorporation of branding or labeling to meet the visual identity and branding requirements of airlines and military units. Offering tailored solutions enhances customer satisfaction and strengthens long-term

relationships.

## Emerging Markets and Infrastructure Expansion

Emerging markets are playing an increasingly significant role in the global aviation industry, and this trend is impacting the aircraft refueling hose market. As countries in Asia, the Middle East, and other regions experience rapid economic growth and urbanization, there is a growing demand for air travel and aviation infrastructure. The expansion and modernization of airports and aviation infrastructure in emerging markets create opportunities for hose manufacturers. New airports and terminals require state-of-the-art refueling systems, including hoses that meet international safety and performance standards. In mature markets, the renovation and upgrade of aging infrastructure also drive demand for advanced refueling hoses. As airports invest in modernization projects, they often seek the latest technology and equipment to improve operational efficiency and safety.

Global infrastructure expansion initiatives, such as the development of new runways and the expansion of existing airports, offer opportunities for hose manufacturers to supply cutting-edge solutions and establish a presence in new markets.

## Adoption of Advanced Fueling Technologies

The aviation industry is witnessing the adoption of advanced fueling technologies, and these technologies influence the design and functionality of aircraft refueling hoses. Two notable trends in this regard are the increasing use of alternative aviation fuels and the development of electric and hybrid-electric aircraft. Alternative aviation fuels, such as sustainable aviation fuels (SAFs), hydrogen, and biofuels, are being explored as environmentally friendly alternatives to traditional jet fuels. These alternative fuels may have different chemical properties and handling requirements, necessitating specialized hoses for their transfer. Electric and hybrid-electric aircraft are also becoming more prevalent in the industry. These aircraft may require hoses for the transfer of cooling fluids, battery fluids, or hydrogen for fuel cells. The development of hoses that can safely and efficiently handle these new fluids is a growing trend in the market.

## Segmental Insights

### Application Type Analysis

Military aircraft had a substantial volume share in 2018, at almost 15%. The reason for

this is the increase in military spending worldwide. the world. To increase system efficiency, industry participants are concentrating on creating technologically superior and lightweight aircraft refueling hoses. Aerial refueling systems, probe and drogue refueling technology, and hoses are recent developments that also contribute considerably toward increasing operational effectiveness and decreasing downtime for flights. In the aircraft refueling hose market, helicopters were valued at more than \$300 million USD in 2018. This can be attributed to the rising demand across a variety of applications, including travel for business, pleasure, and the military. Additionally, the versatility of helicopter operations, such as vertical takeoff and landing as well as simpler manoeuvring and hovering in locations with limited open space. Over the anticipated timeframe, commercial aircraft grew rapidly at a CAGR of about 4%. The expanding disposable income and the expanding tourism sector are two of the key drivers of the commercial aviation industry's expansion. The size of the airplane refueling hose market is growing as low-cost air carriers proliferate and offer expanded air transport networks across several nations at low costs. In order to accommodate the increasing air passenger traffic, airlines are constantly investing in extending their fleet of aircraft. As an illustration, the Brazilian airline Azul announced in 2019 that it has renewed its fleet with fresh orders for Airbus A320neo and Embraer 195-E2 aircraft.

## Regional Insights

The market for airplane refueling hoses is examined, and insights and trends on market size are given by country, kind, application, and sales channel, as previously said. In terms of revenue growth, North America commands the market for airplane refueling hoses. This is primarily caused by the rise in air passenger traffic and the expansion of the new refueling tanker system in this region. Due to the growth of commercial aviation and rising levels of expenditure in the defense sector, the U.S. will lead the North American aircraft refueling hose market. Due to the expansion of the fleet to accommodate the rising passenger traffic as well as the expansion of the tourism industry in this region, Europe is anticipated to have the quickest growth during the forecast period of 2023–2030. The growth in air passenger traffic brought on by the rising demand for low-cost airlines would cause the regional share to increase over the research period. The national portion of the research also lists specific market-impacting elements and modifications to market regulation that have an affect on the market's present and future developments. Data points including technical trends, porter's five forces analysis, case studies, and upstream and downstream value chain analyses are just a few of the indicators utilized to anticipate the market environment for certain nations. When giving prediction analysis of the nation data, it also takes into account the presence and accessibility of global brands, the difficulties they encounter owing to

strong or weak competition from local and domestic brands, the influence of domestic tariffs, and trade routes.

### Recent Developments

Eaton Corporation announced the signing of a contract to buy Cobham Mission Systems, a division of Cobham plc, in February 2021. According to the terms of the contract, Eaton will purchase CMS for USD 2.83 billion, including USD 130 million in tax savings.

The first flight of the MQ-25 T1 test asset with an aerial refueling store (ARS) by The Boeing Company and the US Navy in December 2020 marked an important development milestone for the unmanned aerial refueling tanker.

Airbus SE completed the first-ever completely ASR operation with a boom system in April 2020. An Airbus tanker test aircraft outfitted with the Airbus A3R solution and an F-16 participated in the flight test campaign earlier this year over the Atlantic Ocean.

### Key Market Players

Eaton (Ireland)

PARKER HANNIFIN CORP

RYCO Hydraulics

Kurt Manufacturing

NORRES Schlauchtechnik GmbH

Transfer Oil S.p.A

ContiTech AG

Kanaflex Corporation Co.,ltd.

Pacific Echo

Colex International Limited

## Report Scope:

In this report, the Global Aircraft Refueling Hose Market has been segmented into the following categories, in addition to the industry trends which have also been detailed below:

### Aircraft Refueling Hose Market, By Type:

Composite Hose

Stainless Steel Hose

Rubber Hose

### Aircraft Refueling Hose Market, By Application Type:

Helicopters

Military Aircraft

Unmanned Aerial Vehicle (UAV)

### Aircraft Refueling Hose Market, By Sales Channel:

OEM

Aftermarket

### Aircraft Refueling Hose Market, By Region:

North America

United States

Canada

Mexico

Europe & CIS

Germany

Spain

France

Russia

Italy

United Kingdom

Belgium

Asia-Pacific

China

India

Japan

Indonesia

Thailand

Australia

South Korea

South America

Brazil

Argentina

Colombia

Middle East & Africa

Turkey

Iran

Saudi Arabia

UAE

Competitive Landscape

Company Profiles: Detailed analysis of the major companies present in the Global Aircraft Refueling Hose Market.

Available Customizations:

Global Aircraft Refueling Hose Market report with the given market data, Tech Sci Research offers customizations according to a company's specific needs. The following customization options are available for the report:

Company Information

Detailed analysis and profiling of additional market players (up to five).

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