

North America Fixed-Base Operator Market Forecast to 2028 - COVID-19 Impact and Regional Analysis By Services Offered (Hangaring, Fuelling, Flight Instructions, Aircraft Maintenance, and Aircraft Rental) and Application (Business Aviation and Leisure Aviation)

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Abstracts

The North America fixed-base operator market is expected to grow from US\$ 8,897.06 million in 2022 to US\$ 12,638.33 million by 2028. It is estimated to grow at a CAGR of 6.0% from 2022 to 2028.

Fuelling Services Contribute Significantly to Fixed-Base Operator Service Business is Driving the North America Fixed-Base Operator Market

The fixed-base operators offer a diversified range of services such as hangaring, fuelling, flight instructions, aircraft maintenance, and aircraft rental. Of these, fuelling is the highest revenue generating segments. FBOs across the world offer fuelling services of AVGAS to the piston engine aircraft and/or Jet Fuel to the turbine-powered aircraft. The fuelling services involve selling fuel to plane owners as well as offering them places to park their planes. Since, the business aviation sector has been growing strongly over the past few years (pre-COVID), the demand for fuelling service provider also surged. In addition, several FBOs in the current scenario are offering Sustainable Aviation Fuel (SAF) as a strategy to help the general aviation jet operators to reduce carbon footprint. The distribution of SAF among the FBOs is also aimed at improving their services and attract customers. Signature Aviation and Atlantic Aviation are among the leading FBOs offering SAF to their customers. The growing attraction towards SAF among the FBOs is analyzed to understand the future scenario of the market and has been considered to

be one of the crucial driving parameters for the North America fixed-base operator market. Moreover, several airport authorities are continuously investing in the deployment of fixed-based operators to provide different services to travelers availing general aviation for enhancing their travelling experience. For instance, in February 2021, a mainland aircraft services announced its partnership by investing ~US\$ 12 million for a luxury 'fixed-base operation' and fuel farm at Kalaeloa Airport. The Freeman Holdings Group (Kansas) and Million Air (Texas) together operate as an FBO in the US and offer services such as fuelling, repair, and pilot lounges. -North America. Therefore, such investments in FBO operation in the airport supports the growth of fuelling services among the aircraft owners.

North America Fixed-Base Operator Market Overview

North America is known to have the largest fleet of general aviation aircraft globally, and these aircraft require regular FBO services for operational availability. These economies are characterized by high disposable individual incomes, higher standards of living, and rapid technological advancements in the arena of general aviation and general aviation airport infrastructure. North America comprises the largest fleet of business and personal jets aircraft in the world. Huge volumes of business and personal fleets in operations in the domestic as well as international arena, coupled with the rise in number of FBOs present in the region, propel the North America fixed-base operator market. The general aviation industry in the region is matured and has the presence of several aircraft OEMs. Also, there is an increase in government investments in R&D and the procurement of advanced helicopters, private jets, and trainer aircraft from the regional general aviation service players. The growing focus on enhancing the infrastructure of private airports, along with favorable changes in regulations, is also supporting the North America fixed-base operator market in North America.

Furthermore, the presence of large number of FBOs in the region such as Pentastar Aviation, Xjet, AirFlite, JA Air Center, Tampa International Jet Center, Wilson Air Center, Global Select, Jet Aviation Palm Beach, Meridian Teterboro, and Banyan Air Service, is positively influencing the growth of the market. The FBOs in the region offer diversified general aviation services such as storage, fueling, catering, concierge services, meeting rooms, and maintenance services. The region consists of maximum number of public use and private use airports with one or more than one FBOs present at the airports.

Moreover, some of the recent developments across the North America FBO market include:

- In June 2022, a new fixed-base operator (FBO) providing aeronautical services

officially opened at the Wilmington International Airport.

- In November 2022, Texas's Perot Field Fort Worth Alliance Airport announced the opening of a new FBO terminal across its airport premises.
- In September 2022, Modern Aviation announced that it has closed the acquisition of the FBO assets and operations at Des Moines International Airport from Elliott Aviation, bringing its total number of locations to 13.

However, the COVID-19 pandemic has significantly affected the aviation sector in this region due to various containment measures imposed by the governments such as travel restrictions, shutdowns of businesses, and lockdowns. With the economies reopening in this region and travel industry pacing up, the demand for private jets for traveling with enhanced safety is also upscaling. This is showcasing a rise in demand for fixed-based operator services, thereby boosting the fixed-based operator market. Also, key market players such as Signature Aviation, Jet Aviation (a subsidiary of General Dynamics Corporation), and Universal Aviation among others, operate in the region, which is a key driving factor for the North America fixed-based operator market.

North America Fixed-Base Operator Market Revenue and Forecast to 2028 (US\$ Million)

North America Fixed-Base Operator Market Segmentation

The North America fixed-base operator market is segmented into services offered, application, and country.

Based on services offered, the North America fixed-base operator market is segmented into hangaring, fuelling, flight training, aircraft maintenance, aircraft rental. In 2022, the fuelling segment registered a largest share in the North America fixed-base operator market.

Based on application, the North America fixed-base operator market is bifurcated into Business aviation and leisure aviation. In 2022, the Business aviation segment registered a larger share in the North America fixed-base operator market.

Based on country, the North America fixed-base operator market is segmented into the US, Canada, and Mexico. In 2022, the US segment registered a largest share in the North America fixed-base operator market.

Abilene Aero; Atlantic Aviation FBO Inc.; Avemex SA De CV; DEER JET CO. LTD.; dnata Corporation; ExecuJet Aviation Group AG; General Dynamics Corporation; Jetex; Luxaviation; Signature Aviation; Swissport; and Universal Weather and Aviation, Inc. are the leading companies operating in the North America fixed-base operator market.

Contents

1. INTRODUCTION

- 1.1 Study Scope
- 1.2 The Insight Partners Research Report Guidance
- 1.3 Market Segmentation

2. KEY TAKEAWAYS

3. RESEARCH METHODOLOGY

- 3.1 Coverage
- 3.2 Secondary Research
- 3.3 Primary Research

4. NORTH AMERICA FIXED-BASE OPERATOR MARKET LANDSCAPE

- 4.1 Market Overview
- 4.2 Porter's Five Forces Analysis
 - 4.2.1 Bargaining Power of Buyers
 - 4.2.2 Bargaining Power of Suppliers
 - 4.2.3 Threats to New Entrants
 - 4.2.4 Threats to Substitute
 - 4.2.5 Competitive Rivalry
- 4.3 Ecosystem Analysis

5. NORTH AMERICA FIXED-BASE OPERATOR – MARKET DYNAMICS

- 5.1 Market Driver
 - 5.1.1 Growth of Business Aviation Sector
 - 5.1.2 Fuelling Services Contribute Significantly to FBO Service Business
- 5.2 Market Restraint
 - 5.2.1 Staffing Shortages and High Operational Costs
- 5.3 Trends
 - 5.3.1 Escalating Demand for Hangaring Services for Large Aircraft
- 5.4 Impact Analysis of Drivers and Restraints

6. FIXED-BASE OPERATOR MARKET – NORTH AMERICA MARKET ANALYSIS

6.1 North America Fixed-Base Operator Market Overview

6.2 North America Fixed-Base Operator Market Revenue Forecast and Analysis

7. NORTH AMERICA FIXED-BASE OPERATOR MARKET ANALYSIS – BY SERVICES OFFERED

7.1 Overview

7.2 North America Fixed-Base Operator Market, by Services Offered (2021 and 2028)

7.3 Hangaring

7.3.1 Overview

7.3.2 Hangaring: North America Fixed-Base Operator Market – Revenue and Forecast to 2028 (US\$ Million)

7.4 Fuelling

7.4.1 Overview

7.4.2 Fuelling: North America Fixed-Base Operator Market – Revenue and Forecast to 2028 (US\$ Million)

7.5 Flight Instructions

7.5.1 Overview

7.5.2 Flight Instructions: North America Fixed-Base Operator Market – Revenue and Forecast to 2028 (US\$ Million)

7.6 Aircraft Maintenance

7.6.1 Overview

7.6.2 Aircraft Maintenance: North America Fixed-Base Operator Market – Revenue and Forecast to 2028 (US\$ Million)

7.7 Aircraft Rental

7.7.1 Overview

7.7.2 Aircraft Rental: North America Fixed-Base Operator Market – Revenue and Forecast to 2028 (US\$ Million)

8. NORTH AMERICA FIXED-BASE OPERATOR MARKET – BY APPLICATION

8.1 Overview

8.2 North America Fixed-Base Operator Market, by Application (2021 and 2028)

8.3 Business Aviation

8.3.1 Overview

8.3.2 Business Aviation: North America Fixed-Base Operator Market – Revenue and Forecast to 2028 (US\$ Million)

8.4 Leisure Aviation

8.4.1 Overview

8.4.2 Leisure Aviation: North America Fixed-Base Operator Market – Revenue and Forecast to 2028 (US\$ Million)

9. NORTH AMERICA FIXED-BASE OPERATOR MARKET – COUNTRY ANALYSIS

9.1 Overview

9.1.1 North America: Fixed-Base Operator Market – by Key Country

9.1.1.1 US: Fixed-Base Operator Market – Revenue and Forecast to 2028 (US\$ Million)

9.1.1.1.1 US: Fixed-Base Operator Market – by Services Offered

9.1.1.1.2 US: Fixed-Base Operator Market – by Application

9.1.1.2 Canada: Fixed-Base Operator Market – Revenue and Forecast to 2028 (US\$ Million)

9.1.1.2.1 Canada: Fixed-Base Operator Market – by Services Offered

9.1.1.2.2 Canada: Fixed-Base Operator Market – by Application

9.1.1.3 Mexico: Fixed-Base Operator Market – Revenue and Forecast to 2028 (US\$ Million)

9.1.1.3.1 Mexico: Fixed-Base Operator Market – by Services Offered

9.1.1.3.2 Mexico: Fixed-Base Operator Market – by Application

10. INDUSTRY LANDSCAPE

10.1 Overview

10.2 Market Initiative

10.3 Merger and Acquisition

10.4 New Development

11. COMPANY PROFILES

11.1 Avemex SA De CV

11.1.1 Key Facts

11.1.2 Business Description

11.1.3 Products and Services

11.1.4 Financial Overview

11.1.5 SWOT Analysis

11.1.6 Key Developments

11.2 DEER JET CO. LTD.

11.2.1 Key Facts

- 11.2.2 Business Description
- 11.2.3 Products and Services
- 11.2.4 Financial Overview
- 11.2.5 SWOT Analysis
- 11.2.6 Key Developments
- 11.3 dnata Corporation
- 11.3.1 Key Facts
- 11.3.2 Business Description
- 11.3.3 Products and Services
- 11.3.4 Financial Overview
- 11.3.5 SWOT Analysis
- 11.3.6 Key Developments
- 11.4 General Dynamics Corporation
- 11.4.1 Key Facts
- 11.4.2 Business Description
- 11.4.3 Products and Services
- 11.4.4 Financial Overview
- 11.4.5 SWOT Analysis
- 11.4.6 Key Developments
- 11.5 Jetex
- 11.5.1 Key Facts
- 11.5.2 Business Description
- 11.5.3 Products and Services
- 11.5.4 Financial Overview
- 11.5.5 SWOT Analysis
- 11.5.6 Key Developments
- 11.6 Luxaviation
- 11.6.1 Key Facts
- 11.6.2 Business Description
- 11.6.3 Products and Services
- 11.6.4 Financial Overview
- 11.6.5 SWOT Analysis
- 11.6.6 Key Developments
- 11.7 Signature Aviation
- 11.7.1 Key Facts
- 11.7.2 Business Description
- 11.7.3 Products and Services
- 11.7.4 Financial Overview
- 11.7.5 SWOT Analysis

- 11.7.6 Key Developments
- 11.8 Swissport
 - 11.8.1 Key Facts
 - 11.8.2 Business Description
 - 11.8.3 Products and Services
 - 11.8.4 Financial Overview
 - 11.8.5 SWOT Analysis
 - 11.8.6 Key Developments
- 11.9 Abilene Aero
 - 11.9.1 Key Facts
 - 11.9.2 Business Description
 - 11.9.3 Products and Services
 - 11.9.4 Financial Overview
 - 11.9.5 SWOT Analysis
 - 11.9.6 Key Developments
- 11.10 Atlantic Aviation FBO Inc.
 - 11.10.1 Key Facts
 - 11.10.2 Business Description
 - 11.10.3 Products and Services
 - 11.10.4 Financial Overview
 - 11.10.5 SWOT Analysis
 - 11.10.6 Key Developments
- 11.11 ExecuJet Aviation Group AG
 - 11.11.1 Key Facts
 - 11.11.2 Business Description
 - 11.11.3 Products and Services
 - 11.11.4 Financial Overview
 - 11.11.5 SWOT Analysis
 - 11.11.6 Key Developments
- 11.12 Universal Weather and Aviation, Inc.
 - 11.12.1 Key Facts
 - 11.12.2 Business Description
 - 11.12.3 Products and Services
 - 11.12.4 Financial Overview
 - 11.12.5 SWOT Analysis
 - 11.12.6 Key Developments

12. APPENDIX

12.1 About The Insight Partners

12.2 Word Index

List Of Tables

LIST OF TABLES

Table 1. North America Fixed-Base Operator Market Revenue and Forecast to 2028 (US\$ Million)

Table 2. US: Fixed-Base Operator Market – by Services Offered –Revenue and Forecast to 2028 (US\$ Million)

Table 3. US: Fixed-Base Operator Market – by Application –Revenue and Forecast to 2028 (US\$ Million)

Table 4. Canada: Fixed-Base Operator Market – by Services Offered –Revenue and Forecast to 2028 (US\$ Million)

Table 5. Canada: Fixed-Base Operator Market – by Application –Revenue and Forecast to 2028 (US\$ Million)

Table 6. Mexico: Fixed-Base Operator Market – by Services Offered –Revenue and Forecast to 2028 (US\$ Million)

Table 7. Mexico: Fixed-Base Operator Market – by Application –Revenue and Forecast to 2028 (US\$ Million)

Table 8. List of Abbreviation

List Of Figures

LIST OF FIGURES

- Figure 1. North America Fixed-Base Operator Market Segmentation
- Figure 2. North America Fixed-Base Operator Market Segmentation – By Country
- Figure 3. North America Fixed-Base Operator Market Overview
- Figure 4. North America Fixed-Base Operator Market, by Services Offered
- Figure 5. North America Fixed-Base Operator Market, by Application
- Figure 6. North America Fixed-Base Operator Market, By Country
- Figure 7. North America Fixed-Base Operator Market – Porter’s Five Forces Analysis
- Figure 8. North America Fixed-Base Operator Market: Ecosystem Analysis
- Figure 9. North America Fixed-Base Operator Market: Impact Analysis of Drivers and Restraints
- Figure 10. North America Fixed-Base Operator Market Revenue Forecast and Analysis (US\$ Million)
- Figure 11. North America Fixed-Base Operator Market Revenue Share, by Services Offered (2021 and 2028)
- Figure 12. Hangaring: North America Fixed-Base Operator Market – Revenue and Forecast to 2028 (US\$ Million)
- Figure 13. Fuelling: North America Fixed-Base Operator Market – Revenue and Forecast to 2028 (US\$ Million)
- Figure 14. Flight Instructions: North America Fixed-Base Operator Market – Revenue and Forecast to 2028 (US\$ Million)
- Figure 15. Aircraft Maintenance: North America Fixed-Base Operator Market – Revenue and Forecast to 2028 (US\$ Million)
- Figure 16. Aircraft Rental: North America Fixed-Base Operator Market – Revenue and Forecast to 2028 (US\$ Million)
- Figure 17. North America Fixed-Base Operator Market Revenue Share, by Application (2021 and 2028)
- Figure 18. Business Aviation: North America Fixed-Base Operator Market – Revenue and Forecast to 2028 (US\$ Million)
- Figure 19. Leisure Aviation: North America Fixed-Base Operator Market – Revenue and Forecast to 2028 (US\$ Million)
- Figure 20. North America: Fixed-Base Operator Market, by Key Country - Revenue (2021) (US\$ Million)
- Figure 21. North America: Fixed-Base Operator Market Revenue Share, by Key Country (2021 and 2028)
- Figure 22. US: Fixed-Base Operator Market – Revenue and Forecast to 2028 (US\$

Million)

Figure 23. Canada: Fixed-Base Operator Market – Revenue and Forecast to 2028 (US\$ Million)

Figure 24. Mexico: Fixed-Base Operator Market – Revenue and Forecast to 2028 (US\$ Million)

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