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Description:

Global Flight Simulator Market: Information by Platform (Commercial Aerospace [Full Flight Simulator and Flight Training Devices], Military Aerospace [Air combat Simulator, Basic Flight Trainer, Computer Based Training and Full Mission Simulator and others]), by Aircraft Type (Fixed Wing Aircraft, Rotary Wing Aircraft and UAV), by Simulator Type (Live Simulation and Virtual Simulation) and Region (North America, Europe, Asia-Pacific and Middle East and Africa and Latin America) - Forecast to 2025

Market Scenario

Flight simulation is a cost-effective alternative to live flight training. This solution has received a considerable amount of attention in the past few years due to its wide applications in virtual emergency evacuation, virtual military training, and virtual firefighting systems. In terms of military, all the branches, such as the army, navy, and air force are benefitted by this solution. The Global Flight Simulator Market is estimated to register 5.38% CAGR during the forecast period, 2018–2025. In 2018, the market was led by North America with a 33.49% share, followed by Europe and Asia-Pacific with shares of 21.78% and 7.49%, respectively.

Global flight simulator market growth, 2018–2025

Source: MRFR Analysis

The global flight simulator market is expected to register high growth during the forecast period. The growth of the market is expected to be driven by the increasing focus on implementing flight simulators for training combat aircraft pilots and the growing emphasis on maritime security and subsequent focus on virtual solutions for commercial training. However, the growth of the market can be hindered by the inability of these systems to accurately replicate the physiological effects of these systems.

Global Flight Simulator Market Share, by Region, 2018 (%)
In 2018, North America accounted for the largest market share in the global flight simulator market, followed by Europe, with around 22% of the global market share.

Synopsis

The global flight simulator market has been segmented based on platform, aircraft type, simulator type, and region. By platform, the market has been classified as commercial aerospace and military aerospace. Based on aircraft type, the market has been segmented into fixed-wing aircraft, rotary-wing aircraft, and UAV. Similarly based on simulator type, the market has been segmented into live simulation and virtual simulation.

“North America led the market with a valuation of USD 1,855.2 million in 2018.”

The global flight simulator market has been segmented, by region, into North America, Europe, Asia-Pacific, and the Middle East and Africa, and Latin America. North America is expected to be the largest market for flight simulators. The flight simulator market in North America is expected to register a CAGR of 4.26% during the forecast period. In North America, factors such as favorable defense rules and regulations, and availability of advanced commercial and military infrastructure are bolstering market growth. North America leads in global technological advancements and military expenditure and thus generates a very high demand for simulation and training systems. Although Canada makes some investments in the development of such advanced systems, yet the market is primarily largely dominated by the US.

“The commercial platform segment is expected to dominate the market.”

The demand for passenger and civil aircraft has been increasing over the past few years. According to Honeywell International Inc.’s Turbine-Powered Civilian Helicopter Purchase Outlook, around 4,100 civil helicopters were delivered across the world from 2012 to 2016. In 2017, Bell Helicopter Textron Inc. delivered 132 commercial helicopters as compared to 114 in 2016. Rising demand for commercial helicopters is projected to subsequently fuel in demand for flight simulators.

Companies Covered

The key players in the global flight simulator market are CAE Inc. (Switzerland), L3Harris Technologies, Inc. (US), Lockheed Martin Corporation (US), Advanced Rotorcraft Technology, Inc. (US), Boeing (US), FlightSafety International (US), FRASCA International Inc. (US), Thales Group (France), TRU Simulation + Training Inc. (US), and United Technologies Corporation (UTC) (US).

Key Developments

- In September 2019, Boeing was awarded a contract worth USD 45.8 million by the US Navy to upgrade the flight simulators for the P-8A Poseidon maritime patrol jet.
- In March 2019, CAE Inc. formed a joint venture with Leonardo SpA to provide 3000 Series full-flight simulators for its Philadelphia Training Academy that is expected to open in 2020.
- In July 2018, CAE Inc. launched the CAE 700MR series, a flight training device (FTD), for military helicopters at the Farnborough Airshow at Hampshire, England. It has a fixed-base platform with a dynamic seat for vibration and motion cueing.

Market Segmentation
By Platform: Commercial Aerospace (Full flight simulator, flight training devices), Military Aerospace (Air combat simulator, basic flight trainer, computer-based training, full mission simulator, others)

By Aircraft Type: Fixed-wing aircraft, rotary-wing aircraft, and UAV

By Simulator Type: Live simulation and virtual simulation

By Region: North America, Europe, Asia-Pacific, and the Middle East and Africa, Latin America

Research Methodology

The market values and forecast are derived using the Market Research Future (MRFR) research methodology, which includes secondary research, primary interviews, data triangulation, and validation from an in-house data repository and statistical modeling tools.

Secondary Research

In this process, data is collected from various secondary sources, including annual reports, SEC filings, journals, government associations, aerospace & defense magazines, white papers, corporate presentations, company websites, and paid databases.

Primary Research

In this process, both the demand- and supply-side parties are interviewed to extract facts and insights into the market forecast, production, trends, and projected market growth. Industry stakeholders such as CEOs, VPs, directors, and marketing executives across the value chain are approached to obtain key information.

Key Insights

- Market Sizing, Forecast, and Analysis: Detailed coverage of the market segment and sub-segments
- Regional/Country Trends and Forecast: Detailed analysis of the market in North America, Europe, Asia-Pacific, Middle East & Africa, and Latin America, along with key countries in each region.
- Market Dynamics Intelligence: Market drivers, opportunities, trends, restraints, Porter’s five forces, supply chain, and value chain analysis
- Technology Trends, Regulatory Landscape, and Patent Analysis Outlook
- Competitive Intelligence: Market share analysis, financial analysis, product benchmarking, and strategic developments including joint ventures, product launches, and mergers & acquisitions
- Regional attractiveness and related growth opportunities

Report Customization

MRFR offers report customization to valued customers. Below are the options available for customization:

- Company Profiles
  In-depth profiling of additional market players (3 to 4 companies)

- Country-Level Analysis
  Detailed analysis of a country-level market and related segments as per the report scope (subject to data availability)

Key Questions Addressed by the Report

- What was the historic market size (2018)?
- Which segmentation (platform/aircraft type/simulator type) is driving market growth?
- What will be the growth rate from 2019 to 2025?
- Who are the key players in this market?
- What are the strategies adopted by the key players?
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