

Aircraft Fuel Systems Market Size & Share Analysis - Growth Trends and Forecast (2026 - 2031)

> ****Industry:**** Commercial Aviation & Avionics (Aerospace & Defense)
> ****Source:**** https://www.mordorintelligence.com/industry-reports/aircraft-fuel-systems-market(https://www.mordorintelligence.com/industry-reports/aircraft-fuel-systems-market)
> ****Scraped Date:**** 2026-09-17

Executive Market Summary

Market Metric	Details
Base Market Size	USD 11.09 billion
Projected Forecast (2031)	USD 11.09 billion
Growth Rate (CAGR)	4.47 %
Largest Market Region	N/A
Fastest-Growing Region	N/A

Market Visualizations & Infographics

! [Major players in Aircraft Fuel Systems industry](images/chart_2.png)

! [Aircraft Fuel Systems Market Size](images/chart_3.png)

! [Aircraft Fuel Systems Market Share by Type, 2025](images/chart_4.png)

! [Aircraft Fuel Systems Market Share by End Use, 2025](images/chart_5.png)

! [Aircraft Fuel Systems Market Growth Rate by Region](images/chart_6.png)

! [Aircraft Fuel Systems Market Concentration](images/chart_7.png)

! [Icon](images/chart_8.png)

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Comprehensive Research Analysis

Overview Points List Flex 49 Share Feature End

Market Overview

Study Period | 2020 - 2031 |
Market Size (2026) | USD 11.09 Billion |
Market Size (2031) | USD 13.81 Billion |
Growth Rate (2026 - 2031) | 4.47 % |
Fastest Growing Market | Asia Pacific |
Largest Market | North America |
Market Concentration | Medium |
Major Players*Disclaimer: Major Players sorted in no particular order

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Market Overview

Aircraft Fuel Systems Market Analysis by Mordor IntelligenceThe aircraft fuel systems market size is expected to grow from USD 10.62 billion in 2025 to USD 11.09 billion in 2026 and is forecast to reach USD 13.81 billion by 2031 at 4.47% CAGR over 2026-2031. Heightened aircraft production schedules, autonomy-driven refueling programs, and digital retrofits reinforce demand even as raw-material shortages challenge supply continuity. Airbus alone handed over 51 aircraft in May 2025, led by the A321neo and A321XLR, underscoring a rebound in single-aisle deliveries that depend on advanced fuel-saving architectures. Parallel momentum stems from a USD 898 million US Navy order covering three MQ-25 Stingray unmanned tankers, inaugurating autonomous aerial refueling at sea. North American incumbents such as Parker Hannifin recorded 12% aerospace revenue growth to USD 1.6 billion in Q3 2025, signalling healthy aftermarket pull-through. Asia-Pacific provides the fastest regional lift, posting a 5.78% CAGR on the back of airport infrastructure expansion and rising defence budgets. Regulatory insistence on nitrogen-inerting and shifting toward sustainable aviation fuels (SAF) further stimulates technology upgrades, offsetting certification cost pressures and titanium supply disruptions that persist across civil and military value chains.

Key Report Takeaways

- * By type, gravity feed accounted for 45.05% of the aircraft fuel systems market size in 2025, whereas the fuel injection systems segment is projected to climb at a 6.07% CAGR.
- * By technology, conventional mechanical systems retained 39.45% of the aircraft fuel systems market share in 2025, while smart/connected systems are advancing at a 6.61% CAGR to 2031.
- * By component, fuel tanks dominated, with a 36.15% share of the aircraft fuel systems market in 2025; inerting systems represent the fastest-growing component, with a 5.55% CAGR.
- * By aircraft class, commercial aircraft controlled 59.62% revenue share in 2025; unmanned aerial vehicles are expanding at a 7.55% CAGR during 2026-2031.
- * By end use, OEM sales accounted for 65.02% of the aircraft fuel systems market size in 2025, whereas the aftermarket segment is projected to climb at a 6.28% CAGR.
- * Regionally, North America held 41.98% of the aircraft fuel systems market share in 2025, yet Asia-Pacific is forecasted to post the highest 5.55% CAGR through 2031.

Key Market Trends

Global Aircraft Fuel Systems Market Trends and InsightsDrivers Impact Analysis*

Driver	% Impact on CAGR Forecast	Geographic Relevance	Impact Timeline
Surging global commercial aircraft deliveries	+1.2%	Global (APAC and North America concentration)	Medium term (2-4 years)
Expansion of military aerial-refueling programs	+0.8%	North America, Europe, APAC defense corridors	Long term (≥ 4 years)
Rapid fleet modernization toward fuel-efficient platforms	+1.0%	Global, led by North America and Europe	Medium term (2-4 years)
Rising UAV procurement across civil and defense sectors	+0.6%	Global, early adoption in North America and Europe	Short term (≤ 2 years)
Predictive analytics integration for real-time fuel-system health	+0.4%	North America, Europe, advanced APAC markets	Short term (≤ 2 years)
Mandatory retrofit of nitrogen-inerting systems for safety	+0.3%	Global (FAA and EASA-driven)	Long term (≥ 4 years)

Source: Mordor Intelligence |

Competitive Landscape

Competitive Landscape

The aircraft fuel systems market features a moderately concentrated profile where the top five suppliers account for roughly 55-60% of revenue. Parker Hannifin's aerospace bookings reached USD 7.3 billion by Q3 2025, buoyed by Airbus single-aisle demand and F-35 spares. Safran recorded EUR 7.26 billion (USD 8.51 billion) Q1 2025 revenue, with a 25.1% jump in civil-engine spare-parts turnover that confirms aftermarket resilience.

Strategic realignment continues: Woodward agreed to acquire Safran's electromechanical actuation unit, broadening its fuel-control heritage just as the GE Aviation-Woodward joint venture scales integrated fuel systems for wide-body engines. Honeywell leverages Connected Maintenance to reduce unscheduled events by 30-50%, translating digital leadership into long-term service agreements.

Emerging opportunities cluster around hydrogen storage, autonomous UAV refuelling, and high-blend SAF lines where incumbent IP positions are less fortified. GKN Aerospace's participation in the ICEFlight cryogenic hydrogen project signals early moves toward fuel-cell architectures that could reshape competitive hierarchies.[5]GKN Aerospace, "ICEFlight Hydrogen Collaboration," gknaerospace.com

Aircraft Fuel Systems Industry Leaders* Eaton Corporation plc

- * Parker-Hannifin Corporation
- * Safran SA
- * Woodward, Inc.
- * Crane Aerospace & Electronics (Crane Company)

* *Disclaimer: Major Players sorted in no particular order
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Scope Methodology P Space

This market covers the equipment and assemblies used on aircraft to store aviation fuel, measure it, and safely move it from tanks to engines and the auxiliary power unit during operation, including control and conditioning elements.

Scope exclusions: ground refueling and fueling infrastructure (such as airport refuel trucks, hydrant networks, and fuel storage depots) are not counted.

Segmentation Container

- * By Type* Gravity Feed
- * Pump Feed
- * Fuel Injection Systems
- * By Component* Fuel Tanks
- * Fuel Pumps
- * Valves and Manifolds
- * Gauges and Sensors
- * Inerting Systems
- * Fuel Filters
- * By Aircraft Class* Commercial Aircraft* Narrowbody Aircraft
- * Widebody Aircraft

- * Regional Aircraft
- * Military Aircraft* Combat Aircraft
- * Non-Combat Aircraft
- * Helicopters
- * General Aviation Aircraft* Business Jets
- * Turboprop Aircraft
- * Piston Aircraft
- * Helicopters
- * Unmanned Aerial Vehicles (UAVs)
- * By End Use* OEM
- * Aftermarket
- * By Technology* Conventional Mechanical Systems
- * FADEC-Integrated Electric Systems
- * Inerting-Enabled Systems
- * Smart/Connected Fuel Systems
- * By Geography* North America* United States
- * Canada
- * Mexico
- * Europe* United Kingdom
- * Germany
- * France
- * Russia
- * Rest of Europe
- * Asia-Pacific* China
- * India
- * Japan
- * South Korea
- * Rest of Asia-Pacific
- * South America* Brazil
- * Rest of South America
- * Middle East and Africa* Middle East* United Arab Emirates
- * Saudi Arabia
- * Turkey
- * Rest of Middle East
- * Africa* Egypt
- * South Africa
- * Rest of Africa

Frequently Asked Questions

What is the growth outlook for the aircraft fuel systems market by 2031?

The aircraft fuel systems market is projected to rise from USD 11.09 billion in 2026 to USD 13.81 billion in 2031, reflecting a 4.47% CAGR over 2026-2031.

Which region is expanding the fastest?

Asia-Pacific is forecasted to post a 5.55% CAGR, driven by large commercial fleet additions and growing defence budgets.

How significant is the aftermarket compared with OEM deliveries?

OEM sales still lead with 65.02% revenue share in 2025, yet the aftermarket is growing faster at 6.28% CAGR thanks to predictive maintenance and life-extension programs.

What technology segment shows the highest growth?

Smart/connected fuel systems lead with a 6.61% CAGR as airlines adopt data-rich solutions for predictive health monitoring.

Why are nitrogen-inerting systems gaining traction?

FAA flammability rules require operators to limit tank exposure, prompting a retrofit wave that positions inerting assemblies as the fastest-growing component category at 5.55% CAGR.

How will UAV adoption influence future demand?

UAV fuel systems exhibit a 7.55% CAGR because autonomy and long-endurance missions demand lightweight, highly automated tanks and flow-control hardware.