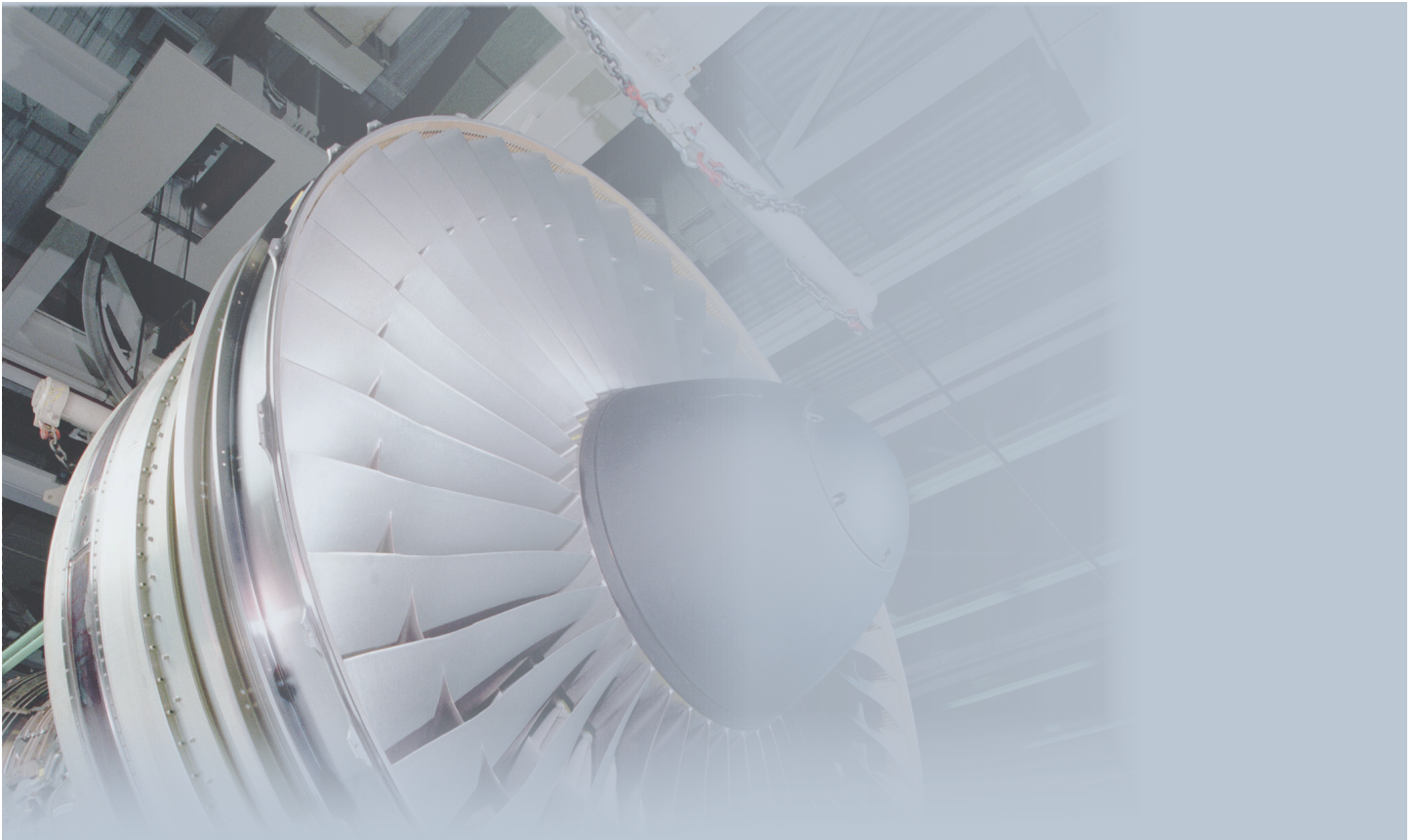


AVIATION GAS TURBINE **FORECAST**

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Analysis 3

The Market for Aviation Turboprop Engines

Executive Summary

Manufacturers of turboprop engines will produce 14,580 units during the 2018-2027 forecast period. Production will increase through 2020 before falling in 2021-2022. It will then return to growth during in 2023 and gradually increase annually through 2027. The total value of production during the 10-year forecast period will reach \$23.4 billion.

Because of the current stability in the factors driving the market, this forecast is consistent with our previous 10-year forecast for the turboprop segment.

Increasing production of civil turboprop-powered regional airliners and general aviation aircraft will drive the overall market higher in the near term. Production for military aircraft will remain relatively stable through 2024 before falling sharply in 2025-2027. Cuts in procurement of military trainers and turboprop-powered unmanned aerial vehicles (UAVs) will be the primary reason for falling demand in the military segment.

This decline will partially offset growth in the civil turboprop market in the same period, leading to a relatively mild increase in overall production of

turboprop engines in the latter half of the forecast period.

The civil market will account for a much higher number of engines produced than the military segment (11,118 versus 3,462). The civil market will account for 60 percent of the turboprop market's value. While military engines will be produced in lower numbers than civil engines, the military segment's 40 percent share of the value of the market is disproportionately higher because the military tends to use the most powerful, and therefore most expensive, turboprop engines.

The turboprop segment is dominated by Pratt & Whitney Canada, which, through production of the PT6A and PT65 engine families at its Pratt & Whitney Canada subsidiary, accounts for more than 75 percent of the engines produced for the turboprop market. Four other manufacturers – Rolls-Royce, GE Aviation, Honeywell, and Europrop International – will account for another 22 percent of the market, with the remaining roughly 3 percent split between domestic-based manufacturers in India and China.

* * *



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