

STRONG LANDING GEAR DEMAND MEETS TIGHT MRO CAPACITY

Demand for landing gear, wheels and carbon brakes remains strong in 2026, driven by rising air traffic, higher fleet utilisation and ageing aircraft. MROX learnt that many aircraft delivered around 2010 are now entering their first major overhaul cycles, while A320neo, A350, 737 MAX and 787 fleets are also contributing to market growth. Narrowbody aircraft, particularly the A320 and 737 families, remain the main demand drivers. Widebody demand is also increasing, led by long-haul growth and overhaul activity for platforms such as the A330, A350 and 787. Fast turnaround has become a key differentiator in landing gear MRO. With spare gear supply limited, efficient logistics, planning and shorter overhaul cycles are essential to reducing aircraft downtime and maximising fleet availability.



Olivier Thomas

How would you describe the current demand for landing gear MRO in 2026?

Olivier Thomas, Safran Landing System - Demand remains strong in 2026, for both landing gear and wheels & carbon brakes, driven by air traffic growth, which has now surpassed pre-COVID levels, and by airlines' need to keep fleets in service.

In parallel, many aircraft delivered around 2010 are reaching their first major overhaul campaigns. The continued ramp-up of the latest aircraft programs such as the A320neo, A350, 737 MAX, and 787 is also contributing to market growth.

Chen Yi Yu, General Manager, HAECO Landing Gear Services - As part of HAECO Group, HAECO Landing Gear Services is a leading provider of landing gear overhaul services with established capabilities spanning Boeing 737, 747, 767, 777 and 787, Airbus A320, Embraer E190 and COMAC C909. This gives us a clear view of demand trends across these platforms. Demand is strong in 2026, and we expect it to remain robust over the next few years.

Dovydas Vaitkevičius, Sales Manager – Landing Gear, APOC Aviation - Demand remains strong across both the narrow-body and wide-body segments. That said, larger narrow-body operators often bundle their landing gear changes into fleet-wide agreements with the OEM or independent shops. The narrow-body market is well supplied with material overall, but the challenge lies in securing gear that still has valuable green time and getting it tagged and released, particularly in Europe. At APOC, our extensive network and inventory let us source serviceable narrow-body gear and green-time assets quickly, cutting through the bottlenecks that slow operators down and keeping their fleets in the air. The wide-body segment is another story: while Boeing landing gear still allows operators to forecast their upcoming changes, the Airbus A330 platform suffers from a parts shortage, which drives demand higher still.

Dan Trigg, Director of Sales – Airframe, EirTrade Aviation - Demand is strong and will continue to increase. With the rise in ageing fleets and the increased number of flights/cycles being utilised comes an increase in scheduled landing gear overhauls and repairs. However, this increase in demand also creates capacity problems. Landing Gear repair/

overhaul is a very specialised sector of the MRO market and there are only a limited number of shops who can assist. This causes long delays and difficulty finding a slot in the desired timeframe.

Which aircraft platforms are currently driving the strongest landing gear overhaul demand?

Olivier Thomas - The strongest demand is currently driven by the narrowbody segment, particularly the Airbus A320 and Boeing 737 families, which remain the backbone of the global fleet. Driven by the long-haul growth, Demand is also increasing for widebody aircraft, especially legacy platforms such as the A330, while the latest generation programs including the Airbus A350 and Boeing 787, are now also entering their first major overhaul cycles.

To support this growing demand, Safran Landing Systems strengthened its global landing gear MRO capabilities in 2025 across Europe (Molsheim), the Americas (Querétaro) and Asia (Singapore), with a particular focus on these key aircraft programs.

Chen Yi Yu - Among the aircraft platforms supported by HAECO, we are seeing particularly strong demand for Boeing 777, 787 and Airbus A350 landing gear overhaul services. Narrowbody aircraft



platforms also generate significant overhaul demand.

Dovydas Vaitkevičius - The A320 remains a strong overhaul contender, though we're increasingly seeing demand for partial green-time gear as operators seek more flexible, cost-effective options. Currently, overhauled A330 gear is in particularly short supply, making reliable access to material more valuable than ever. Although less visible, given the smaller fleet, ATR operators are also facing shortages, creating a genuine challenge for those who operate the type.

Dan Trigg - Narrowbody aircraft such as A320 and 737NG are the strongest drivers. As landing gear removals are often scheduled around cycle limits as well as time limits, these aircraft reach the cycle limits quicker due to the short-haul nature of their schedules.

On the widebody, the 787 landing gear overhaul demand is starting to really grow. The older aircraft in the fleet are reaching the age where their landing gears require overhaul so we are seeing an influx of 787 gears at MROs.

How are aging aircraft fleets affecting landing gear overhaul requirements?

Olivier Thomas - Aging aircraft fleets are driving a significant increase in landing gear overhaul requirements. Many aircraft remain in service well beyond their originally planned retirement dates, extending the typical 25-year lifespan of a landing gear.

These aging fleets also require more extensive inspections, repairs and component replacements during overhaul, increasing the demand for engineering expertise, repair capabilities, and access to certified spare parts.

Chen Yi Yu - Ageing aircraft can increase the complexity of landing gear overhaul

programmes. For example, legacy platforms often require the development, approval and implementation of concession repairs for various components. Where repairs are no longer feasible, sourcing replacement parts can be challenging, as some components may no longer be stocked by OEMs or be subject to extended lead times. In such cases, our engineering and materials teams need to be resourceful and work closely with customers to identify effective solutions.

Dovydas Vaitkevičius - Older aircraft mainly drive up "over and above" costs. Because ageing landing gear has accumulated more wear over its life, shops tend to find more out-of-scope parts once the gear is stripped down, adding both cost and time to the overhaul. Concessions are a further factor. With Airbus, obtaining the necessary approvals takes around three times longer than with Boeing, which can significantly extend turnaround. Occasional parts shortages add another layer of delay, which is why reliable access to material makes the real difference.

Are operators increasingly looking for landing gear life-extension solutions?

Olivier Thomas - Yes. Operators are increasingly looking for landing gear life-extension solutions as they seek to reduce operating costs, maximize asset utilization, and improve sustainability.

As both an OEM and a service provider covering the full lifecycle of its products, Safran Landing Systems is uniquely positioned to support this evolution. By combining design expertise, operational feedback, and in-service data analysis, we can identify opportunities to optimize maintenance intervals, enhance repair solutions, and continuously improve product performance throughout its service life.

In the wheels and carbon brakes



Chen Yi Yu

market, the same objective applies: increasing operational efficiency and product longevity. Our solutions are designed to reduce aircraft turnaround time through shorter cooling times, deliver strong endurance with an average of 2,200 landings per overhaul (LPO), and maintain low oxidation levels. These characteristics help operators minimize maintenance disruptions, improve fleet availability, and reduce overall operating costs.

Chen Yi Yu - While we have seen some operators explore, and in some cases, successfully implement extensions to landing gear overhaul intervals, we believe adoption remains limited to a relatively small number of operators. This is because obtaining regulatory approval requires significant data collection and analysis, which can be both complex and resource-intensive. In addition, newer aircraft platforms are being designed with longer overhaul intervals from the outset, reducing the need for life-extension initiatives.

Dovydas Vaitkevičius - Yes. Once they begin searching for a set, most of our clients choose to extend the life of the existing unit for a range of reasons: weighing budget against current market value, avoiding prolonged shop overhauls, or managing traceability checks. This is especially true in the exchange model, where traceability of both the vendor's and the client's landing gear must meet the required standard.

How important is a faster turnaround time in today's landing gear MRO market?

Olivier Thomas - Faster turnaround time has become one of the most critical





Dovydas Vaitkevičius,

differentiators in today's landing gear MRO market. Aircraft availability is a top priority for operators, and reducing downtime is essential to maintaining fleet performance and meeting operational commitments.

At Safran Landing Systems, we address this challenge through our global network of MRO centers and strategic partnerships across Europe, Asia and the Americas. Combined with flexible inventory management and the effective use of rotatable parts, this contributes to develop responsive support wherever and whenever it is needed.

Beyond landing gear, we are also leveraging artificial intelligence in our Wheels & Brakes activities. By combining fleet usage data, landing conditions and information from the heat-sink exchanges we perform each month, we can better anticipate demand for carbon disk replacements, optimize maintenance

planning and further improve turnaround times and fleet availability for our customers.

Chen Yi Yu - Faster turnaround time is critical in today's landing gear MRO market, as the supply of spare landing gear remains limited relative to demand. By combining efficient logistics with effective hangar planning, shorter overhaul turnaround times allow the same asset to support more gear removals, helping airlines minimise downtime and maximise fleet availability. At HAECO, investments in production analytics, bottleneck management and in-house repair technologies have helped support industry-leading turnaround performance for key widebody platforms.

Dovydas Vaitkevičius - Extremely important. In today's market, the ability to commit to a deadline on the Airbus A320 and A330 platforms is highly valued, given the ongoing parts shortage. Operators need partners they can rely on to keep their aircraft moving. At APOC, our global network, proactive sourcing and expansive inventory allow us to reduce downtime and deliver material when it matters most.

What are the biggest challenges in reducing landing gear overhaul TAT?

Olivier Thomas - Reducing landing gear overhaul TAT is a complex challenge because each overhaul is unique. While industrial capacity, spare parts availability and repair capabilities are key factors, the biggest source of variability often comes from the condition of the equipment itself once it is disassembled. Unexpected findings, additional inspections, or engineering assessments can be required when wear, corrosion or damage exceed



initial expectations.

The challenge is therefore to continuously improve planning, repair capabilities and supply chain responsiveness while maintaining the highest standards of safety and airworthiness. This requires close coordination between engineering, operations, and support teams to address unforeseen issues as efficiently as possible.

Chen Yi Yu - In reducing landing gear overhaul TAT, the biggest challenge we face is ongoing supply chain constraints, particularly prolonged parts shortages at OEMs, which can at times be exacerbated by geopolitical developments. To address these challenges, we work closely with OEMs and suppliers, supported by proactive planning and inventory management initiatives that strengthen supply chain resilience. HAECO has also dedicated additional resources to workshop planning and invested in additional inventory with the aim of maintaining consistent TAT for our customers.

Dovydas Vaitkevičius - The two main drivers are workforce forecasting and the ongoing spare parts shortage. When either falls short, turnaround times extend. Reliable access to material is therefore key to keeping overhauls on schedule.

Are airlines increasingly using exchange units, USM and landing gear pools to reduce aircraft downtime?

Olivier Thomas - Yes, the use of landing gear exchange programs, USM, and landing gear pool solutions has become essential in today's MRO market. The primary benefits for operators include a faster return into service for their aircraft and reduced costs through optimized asset utilization.

Chen Yi Yu - The exchange of landing gears and components has always played an important role in landing gear MRO. Many major operators maintain their own spare landing gear assets while also leveraging exchange pools to reduce aircraft downtime and maximise landing gear green-time utilisation. HAECO also provides rotatable support, exchange





and leasing solutions to help customers maintain operational continuity. Used serviceable material (USM) also plays an important role, particularly for older aircraft platforms, due to its cost and availability advantages.

Dovydas Vaitkevičius - Indeed. In the past, operators could map out their overhaul changes well in advance, in a Gantt-chart fashion, and a single “roll-around” set was enough to cover the cycle. Today, demand for exchange units has grown significantly, as they ease both cashflow and forward-planning pressures. This “buy now, worry later” solution gives operators the serviceable gear they need without the upfront cost or the burden of perfect forecasting.

Dan Trigg - Yes, due to the time it can take to remove and overhaul/repair landing gear and then fit back to the aircraft, airlines are frequently looking for exchange sets to reduce aircraft downtime. At EirTrade, we have a large number of landing gear sets across many platforms that can help support airlines with these issues.

How is the arrival of newer aircraft platforms such as the A350 changing landing gear MRO requirements?

Olivier Thomas - MRO requirements for new aircraft platforms are generally similar to those of previous programs, with a focus on improved TBO intervals. The main distinction from older programs is their greater technical sophistication, particularly in terms of materials and systems.

Chen Yi Yu - New aircraft platforms, such as the Airbus A350 and Boeing 787, have introduced new industrial technologies into the landing gear overhaul process. These include high-velocity oxygen fuel (HVOF) coating and plating processes that are not used on current aircraft platforms. As a result, MRO providers must either build these capabilities in-house or outsource them to meet the requirements of newer aircraft types. HAECO has invested in specialised capabilities such as in-house HVOF coating and continues to expand its support for next-generation platforms,

including the A350, A320neo, A321neo and B737-MAX.

Dovydas Vaitkevičius - The effect of newer aircraft platforms takes time to materialise. In today’s ever-changing climate, operators are holding onto older aircraft types until the current geopolitical uncertainties settle. At the same time, overhauls for many newer platforms still sit with the OEM shops, so turnaround times there will continue to lengthen until enough independent shops are approved to take on the work.

What do you see as the biggest opportunities for landing gear MRO through 2030?

Olivier Thomas - The landing gear MRO market is experiencing steady growth and requires significant investment to keep pace with rising demand, especially to support next-generation aircraft. MRO providers that are willing to invest in expanding capacity, offering innovative services like exchange and pool programs, and ensuring competitive turnaround times will be well-positioned to capture new market opportunities and strengthen their market presence.

Chen Yi Yu - We anticipate the years leading up to 2030 to be a period of significant change and advancement as landing gear overhaul requirements transition from current-generation aircraft to newer platforms, including the Boeing 737-MAX, Boeing 787, Airbus A320neo, A330neo and A350. As a leading global MRO provider, HAECO is focused on incorporating advanced industrial technologies, harnessing the power of AI to enhance operational efficiency, and developing the next generation of talent to capture these emerging opportunities. At the same time, we continue to invest in capabilities for next-generation aircraft platforms to support the industry’s evolving needs.



Dan Trigg

Dovydas Vaitkevičius - Boeing MAX gears represent a growing opportunity as that fleet matures. Airbus A330 overhauls will also remain significant, with many aircraft still to catch up on overhaul dates



missed in recent years. And the A320neo will come into play over the next two to three years as its early fleet reaches first overhaul. Across all three, demand will hinge on reliable access to material and serviceable assets, positioning APOC to support operators through to 2030 and beyond.

