

IATA PMA Survey Results

Background

The IATA Board of Governors have designated supply chain challenges as a key strategic priority for the aviation industry. One such challenge is the lack of parts resulting in delays in turnaround times and lack of availability of aircraft and powerplants, which is a huge financial pain point (upwards of \$11 billion USD¹) for airlines as they are seeing increased operating costs and impact on their operations such as reduced flights.

In April 2025, IATA held a Supply Chain Workshop in Geneva with 50 senior leaders representing the entire aviation ecosystem—including airlines, lessors, aircraft/engine/component manufacturers, and MROs—to collaboratively address critical supply chain challenges.

One viable solution that emerged from the workshop on how to mitigate capacity challenges in the aftermarket is the increased usage of alternative solutions -such as PMA (Parts Manufacturer Approval) parts, Part 21 and/or Design Engineering Representative (DER) repairs, and used serviceable material (USM).

As reflected in the white paper titled "[Reviving the Commercial Aircraft Supply Chain](#)", published on October 13th 2025, IATA actively supports and encourages the use of alternative solutions to mitigate current supply chain challenges.

To explore this further, a dedicated advisory group was established to identify the barriers which may typically limit a broader industry deployment of such approved solutions. As an initial step—focusing specifically on PMA parts—a survey was distributed to airlines with the aim of gaining deeper insight into current adoption practices and perceptions.

The findings from this survey are presented below.

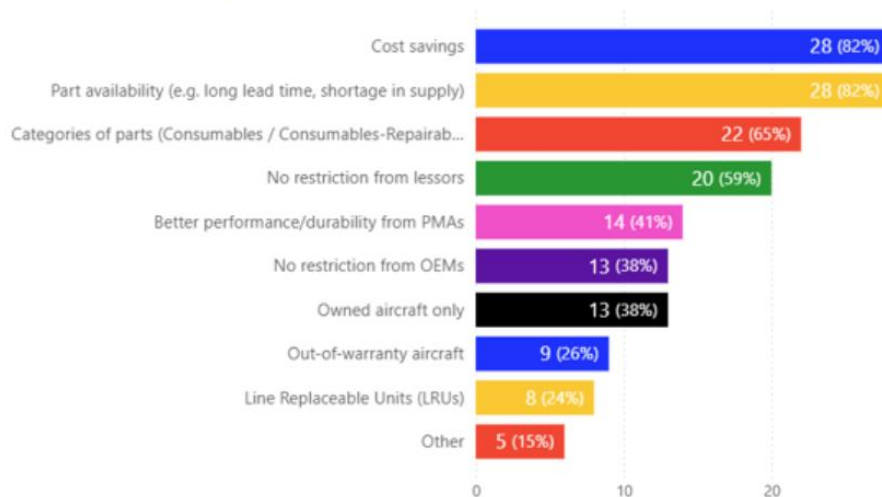
¹ Oliver Wyman & IATA, [Reviving the Commercial Aircraft Supply Chain](#)

Key findings

The survey included responses from 46 airlines, with 74% confirming the use of PMA parts within their fleets. Geographically, participation was highest among European carriers (50%), followed by the Americas (20%), Africa and the Middle East (17%), Asia Pacific (11%), and North Asia (2%).

When asked about the criteria considered when evaluating PMA parts for their fleets, cost savings and part availability were equally prioritized, each cited by 82% of respondents. Other influential factors included the type of part (65%) and restrictions imposed by lessors (59%).

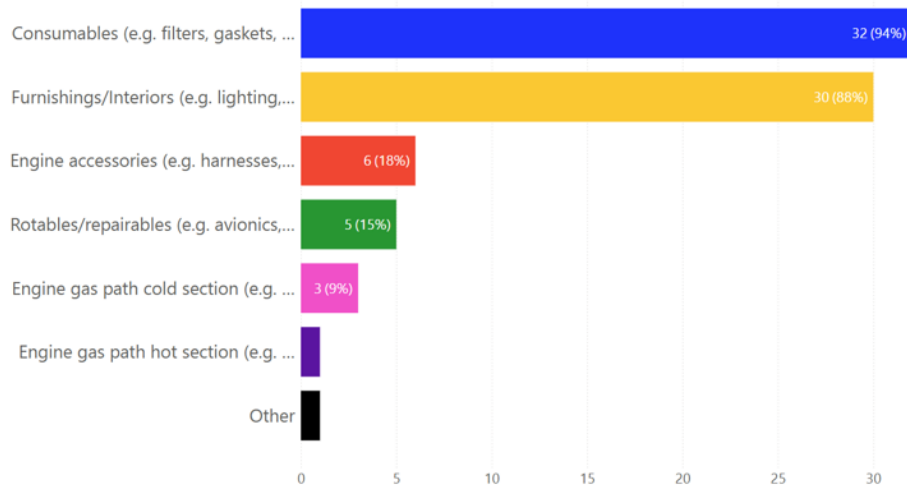
What criteria does your company consider when using PMAs?



As a follow-up to the previous question, airlines were asked which categories of parts comprise the majority of their PMA purchases. Most PMA usage is concentrated on airframe components, with greater usage in consumables and cabin items. Currently, there is lower adoption of PMA parts on landing gear, APUs, and engines.

Out of the respondents who use PMA parts, 94% reported using consumable PMA parts—likely due to their high turnover rate, relatively low cost compared to critical components, and minimal impact on aircraft redelivery. The second most common category is furnishings and interior components, with 88% of airlines confirming PMA usage within the cabin.

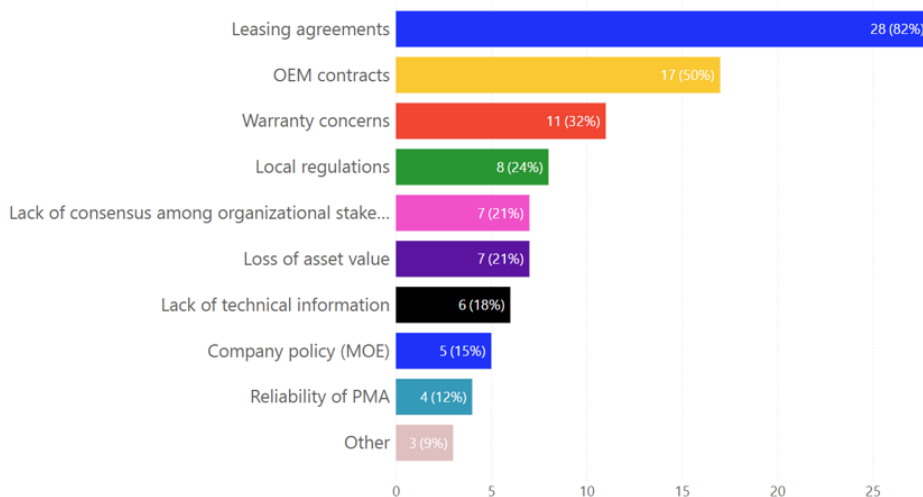
What category of parts make up the bulk of your company's PMA purchases?



Nearly three-quarters of the airlines that reported using PMA parts within their fleets indicated that there are active initiatives underway to expand their use. Increasingly, airlines are turning to PMA as a cost-effective solution to rising operational expenses and as a means to address ongoing supply chain disruptions affecting the industry.

Over time, the industry has shifted from predominantly owned fleets to a mix of owned and leased aircraft¹. While leasing agreements have become more accommodating of PMA and Part 21 / DER repairs usage, many still contain restrictions on the use of other approved parts, repairs, and modifications. According to survey responses, the most significant barrier—identified by 82% of participating airlines—is leasing contract limitations, followed closely by constraints imposed by OEM agreements (50%).

What obstacle is stopping your company from using more PMAs?



Planned Initiatives

Based on the feedback from participating airlines and insights from industry stakeholders, the advisory group developed strategic initiatives aimed at addressing the key barriers to broader adoption of approved alternative solutions.

Approved Alternative Solution Workshop in Aircraft Leasing

Given that leasing agreements were identified as the primary barrier to increased PMA adoption, the advisory group convened a workshop in Dublin, Ireland, bringing together leasing companies, airlines, and industry experts to discuss approved non-OEM solutions. The discussions focused on finding a pragmatic middle ground—one that supports IATA's objective to expand the use of approved non-OEM parts, while also considering airline operational efficiency and the future remarketability of assets for lessors.

While further refinement is needed, the recommendations emerging from the workshop will be incorporated into an upcoming revision of [IATA's Guidance and Best Practices for Aircraft Leases](#).

Approved Alternative Solution Webinar (November 2025)

Education plays a critical role in driving the broader adoption of alternative solutions. While PMA parts are often the focus, the range of approved non-OEM options extends further to include EASA Part 21 repairs, FAA DER repairs, Supplemental Type Certificates (STCs), Owner Produced Parts (OPPs), and more—each governed by distinct approval processes and technical requirements.

As the industry continues to embrace these alternatives, there is clear value in offering educational refreshers to clarify the nuances. To support this, the advisory group is prioritizing industry-wide education on approved alternative solutions—not just PMA parts. A webinar is being organized specifically for airlines, MROs, and repair stations, targeting professionals involved in technical operations, asset management, supply chain, and anyone working with parts, repairs, and modifications.

[Watch the Recording](#) / [Download the Presentation](#) (pdf) / [More Details](#) (iata.org)

Approved Alternative Solution Workshop for Airlines/Operators

Building on the success of the aircraft leasing workshop, the advisory group will organize a dedicated session focused on airlines and operators. The goal is to create an industry forum where airlines can exchange best practices, share case studies, and collaboratively address perceived barriers to the adoption of approved alternative solutions.

This workshop aims to provide practical guidance and support to help airlines expand the acceptance and integration of alternative solutions across the aviation sector.