

Aero-Engine and IGT components 2020

The eight annual review of this market from Counterpoint Market Intelligence Limited

Why buy this 550-page report?

Because we have been analysing the market for a long time, both in the manufacturing sector and now, over the last 15 years, as analysts.

The supply chain has been under huge pressure as the aero-engine OEMs have prioritised ramping up production of new engines, while the aftermarket has seen a surge in demand for spares to support mature engine MRO.

Our new report also offers comprehensive market analysis including:

- The estimated growth in this \$85 billion market over the next 10 years
- How the market segments by:
 - Aero-engine civil and military: OE and aftermarket
 - Industrial gas turbine (IGT): OE and aftermarket
 - The principal manufacturing processes e.g. casting, forging, machining etc.
- Component type e.g. engine modules, LLPs, blisks, transmissions
- Market shares in the main manufacturing processes and selected product categories
- New engine programmes and forecast market shares
 - Supplier market share changes caused by changes in engine OEMs' market shares
- Demand drivers for aero-engines, IGTs and aftermarket
- Market trends and its key characteristics
 - Identification of the seven fastest growing segments in engine components
 - The shape and tiers of the supply chain broken down by role and by principal process
 - History and current trends in consolidation
 - The extent to which engine OEMs are vertically integrating components seen as critical whilst outsourcing others
 - The growing impact of Ceramic Matrix and Polymer Composites and Additive Manufacturing
 - The importance of government-funded technology programmes
 - Risk and revenue sharing partnerships
 - A strong aftermarket, as fleet sizes grow, leading to engine OEMs wanting greater involvement
- Analysis of financial returns:
 - The reasons why the strategic partners make reasonable returns
 - The benefits of the proprietary technology involved in complex castings and forgings.
 - Very variable returns in machining.
 - The best returns in coating
- Key strategies of suppliers, including:
 - Vertical integration, investment in new capacity, new technologies, use of low-cost countries, building a product-based business, and acquisition/JV.
 - Identifying corporate moves over the last two years

The report provides profiles of 151 companies. Our expanded profiles cover;

- Origins and ownership; Our estimate of engine component sales, plus financials if obtainable; operations and technologies; customers and contracts; strategy and recent developments; our comments including on strategic position

We offer purchasers of our report a free teleconference to discuss any aspects.

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WHY COUNTERPOINT?

Counterpoint Market Intelligence Limited was formed by George Burton and Richard Apps in 2004 to offer original, independent and rigorous research into aerospace markets. Between them, George and Richard have over 40 years of experience in senior positions in aerostructures, engine components, and aerospace equipment.

Counterpoint is an international business, with 80% of sales outside the UK. Sales of research reports have led to consultancy projects. Two thirds of sales are to the aerospace industry – aircraft and engine OEMs and first and second tier suppliers. Other clients are private equity funds, investment banks and government organisations.

In addition to this report the following reports are available from Counterpoint Market Intelligence Limited:

- Aircraft interiors 2019
- Aerostructures 2019
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- Aerospace actuation 2018
- Tooling & automated assembly for aerostructures 2017
- Mini reports;
 - Aircraft Fluid Conveyance 2019
 - Aerospace Sensors 2019
 - Aerospace valves 2019
 - Aerospace Machining 2019
 - Aerospace Environmental Control Systems 2018
 - Aircraft Harnesses and Electrical Standard Parts 2018
 - Engine controls and fuel systems 2018
 - Aerospace ball screws 2015
 - Stuffing for airframes 2015

Counterpoint Market Intelligence Limited also undertakes commissioned consultancy studies for its clients in areas including the following:

- Deep-dive market analysis
- Evaluation of the strategic positioning of businesses
- Market and strategy-related due diligence for M&A
- Acquisitions search

How to buy the report

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