

Aerospace Environmental Control Systems 2015

The second report on Aerospace Environmental Control Systems from
Counterpoint Market Intelligence Limited

Why buy this report?

Our new 82-page report covers fixed-wing aircraft and helicopter cabin and cockpit ECS including

- Aircraft Pressurisation
- Air conditioning and temperature control systems
- Bleed air systems

As well as cockpit and cabin ECS, the Report also includes

- Avionic and target acquisition cooling systems
- Hot air de-icing and de-misting systems
- Companies which make significant components for ECS and bleed air systems e.g. valves and heat exchangers

We have created a detailed market model and from this we show market analysis for both OE and aftermarket

- Estimated 2013 market size, including OE, aftermarket spares and repairs estimates
- We break-down this data by
 - Market segments: bleed air sub-systems, ECS heating & cooling sub-systems, pressurisation sub-systems, and airframe system parts
 - Aircraft type: large commercial aircraft, regional aircraft, bizjets and GA, helicopters, military transports, fighter/attack aircraft and military trainers
- Estimated market growth, including 2013-2023 CAGRs
- We describe the ECS market structure and supply chain and give our estimates of the market shares of the leading systems suppliers.
- Including how we see OE market shares evolving, based on programme wins and our forecasts for new aircraft deliveries

We look at trends in the market including

- Air cycle versus vapour cycle
- the effect of the trend toward the 'more electric' aircraft
- Titanium heat exchangers

The report provides profiles of 49 companies. Our expanded profiles cover

- Origins and ownership
- Estimate of ECS sales & financials
- Operations and technologies
- Customers and contracts
- Strategy
- Recent developments
- Our comments

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

CONTENTS

- 1. Summary**
- 2. Scope**
- 3. Market characteristics and trends**
 - 3.1. Early history - Aircraft Pressurisation Systems
 - 3.2. Aircraft Air Conditioning Systems - brief introduction
 - 3.3. Heat Exchangers
 - 3.4. Air Filtration and Purification
 - 3.5. Avionics Cooling
 - 3.6. Pod Cooling
 - 3.7. Supplemental cooling systems
 - 3.8. Technology Trends
 - 3.8.1. Air cycle versus vapour cycle
 - 3.8.2. The more electric aircraft
 - 3.8.3. Titanium heat exchangers
 - 3.9. Market hierarchy
 - 3.10. The aftermarket
 - 3.11. Components
- 4. Quantitative market analysis**
 - 4.1. Industry structure
 - 4.2. Market size by segment
 - 4.3. Market growth
 - 4.4. Overall market shares
- 5. Sector analysis**
 - 5.1. Bleed air sub-system
 - 5.1.1. Market size and growth
 - 5.1.2. Market shares
 - 5.2. Pressurisation sub-system
 - 5.2.1. Market size and growth
 - 5.2.2. Market shares
 - 5.3. Pod cooling
 - 5.3.1. Market size and growth
 - 5.3.2. Market shares
- 6. Profiles of key players in ECS**
 - 6.1. Large ECS systems companies
Profiles of 3 companies
 - 6.2. Smaller ECS systems companies
Profiles of 10 companies
 - 6.3. ECS component suppliers - North America
Profiles of 21 companies
 - 6.4. ECS component suppliers - Europe
Profiles of 8 suppliers
 - 6.5. Other suppliers - ROW
Profiles of 7 suppliers
- 7. Counterpoint Market Intelligence Limited terms of business**

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 now has 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 prime contractors 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:

- Commercial Aircraft Interiors 2014
- Aerostructures 2014
- Systems/stuffing for aerostructures 2014
- Aerospace actuation 2014
- Tooling for aerostructures 2014
- Aero-engine and IGT components 2013
- Trends in government funding of aerospace 2012
- Mini reports;
 - o Engine controls and fuel systems
 - o Aerospace ball screws
 - o Aerospace valves

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

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

George Burton Tel: +44 (0)1747 852805
Mobile: +44 (0)7770 982153
e-mail: georgeburton@cpmil.com

Richard Apps Tel: +44 (0)1235 868051
Mobile: +44 (0)7741 035969
e-mail: richardapps@cpmil.com

Address: Counterpoint Market Intelligence Ltd, Curlew Meadow, Denchworth, Oxfordshire OX12 0EA, UK

Website: www.cpmil.com

COUNTERPOINT MARKET INTELLIGENCE LIMITED TERMS AND CONDITIONS OF TRADING

Limitation on liability of Counterpoint Market intelligence Limited

Counterpoint Market Intelligence Limited makes no representation or warranty, expressed or implied, as to the accuracy or completeness of the information contained in this report. Counterpoint Market Intelligence Limited shall not be held liable for consequential and indirect losses or loss of profit or revenue resulting from the use of this report. No recommendations are made or should be implied from this report.

Intellectual Property

In so far as any information provided by Counterpoint Market Intelligence Limited is not in the public domain Counterpoint Market Intelligence Limited will retain ownership of any intellectual property in that information but customers will have a right to use the information provided solely within their own companies and subsidiaries. Customers shall not sell nor give this report to companies or persons outside their own company and subsidiaries.

Payment

Payment of Counterpoint Market Intelligence Limited's invoices is to be made within 30 days of the date of invoice.

Governing Law and Jurisdiction

Any dispute or claim arising out of or in connection with this report (including non-contractual disputes or claims) shall be governed by, and construed in accordance with, the Law of England and Wales. The purchaser of this report irrevocably agrees that the courts of England and Wales shall have exclusive jurisdiction to settle any dispute or claim that arises out of or in connection with this Report (including non-contractual disputes or claims).