

Aerostructures 2018

The 14th annual review of the world aerostructures market from
Counterpoint Market Intelligence Limited

Why buy this 700-page report?

Because, in this traditionally conservative market, there is lots of revolutionary change. And because we have had discussions with companies at all levels in the supply chain. And we have introduced much greater granularity into our modelling.

In our latest report we observe that: The volume of deliveries is up; aerostructures sales are flat because of pricing pressure; supplier margins in 2017 are down on 2016

- Our 2018 report offers comprehensive market analysis including:
 - The estimated growth in, and segmentation of, this \$61 billion market
 - 10-year growth forecasts composite, titanium and other metallic structures
 - Civil and military: OE production, spares and modifications
 - Generic aircraft type: e.g. large commercial, regional, business, helicopters
 - Aerostructures product type: wings, fuselage, nacelles & pylons, empennage
 - Market tier: super tier-1, tier-1, tier-2; the value of sales at different points in the supply chain
 - Regional production; customer orientation of suppliers; supplier numbers in each tier
- Market trends and its key characteristics
 - Analysis of recent aerostructures contract awards, and the factors leading to successful bids
 - A new deflationary environment for suppliers: causes and consequences
 - Competitive background by segment and sub segment
 - Evolution of composite materials and technology
 - Analysis of the structure of the composites supply chain and assessment of entry barriers
 - The increasing role of China
 - M&A activities
 - Outsourcing to China
 - Comac's aerostructures tier 1s
 - the level of insourcing/outsourcing (including an estimate for each OEM)
- Analysis of financial returns:
 - A reduction in reported 2017 margins vs 2016
 - Determinants of profitability e.g. OEM price downs and level of automation
 - An increase in companies reporting financial challenges
- Key strategies including:
 - the use of low cost countries (including the economic case)
 - establishing a footprint local to customers
 - building a product specialty, and/or a process specialisation
 - consolidation: history and recent deals
 - who's doing what in: automation e.g. AFP/ATL and robotics
 - the fight-back of metal: new alloys; new metal forming/joining; additive manufacturing
 - investing in new manufacturing capacity

The report provides profiles of 185 companies. Our expanded profiles cover;

- Origins and ownership; Our estimate of aerostructures sales, plus financials if obtainable; operations and technologies; customers and contracts; strategy and recent developments; our comments including our categorisation of composites capability

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 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:

- Aerospace composites 2018
- Aero-engine and IGT components 2017
- Aircraft Interiors 2017
- Tooling & automated assembly for aerostructures 2017
- Aerospace Actuation 2016
- Airborne Pods 2016
- Mini reports;
 - Environmental control systems 2018
 - Aircraft Harnesses and Electrical Standard Parts 2018
 - Aircraft Interior Lighting 2018
 - Engine controls and fuel systems 2018
 - Aerospace valves 2017
 - Aircraft fluid conveyance 2017
 - Aerospace Machining 2016
 - 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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