

Aerostructures 2019

The 15th annual review of the world aerostructures market from
Counterpoint Market Intelligence Limited

Why buy this 740-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.

This year, we find that, though some big suppliers are finding the aerostructures market too difficult, most tier-1 suppliers' margins are rising, despite downward pressure from the aircraft OEMs.

Our 2019 report also offers comprehensive market analysis including:

- The estimated growth in, and segmentation of, this \$65 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
- Customer orientation of suppliers; supplier numbers in each tier
- Shares of the aerostructures market by country of manufacture
- Market trends and its key characteristics
 - How the aircraft OEMs are viewing outsourcing, including an estimate for the level of insourcing/outsourcing for each OEM.
 - Competitive background by segment and sub segment
 - Evolution of composite materials and technology: thermoplastics, out-of-autoclave, lay-up rates.
 - Analysis of the structure of the composites supply chain and assessment of entry barriers
 - The role of governments: share ownership, R&T, offset, environmental, infrastructure support.
 - The evolving role of China
- Analysis of financial returns:
 - How the sales of aircraft OEMs and tier-1 aerostructures companies are growing relative to the volume of aerostructures manufactured, measured by weight.
 - How and why aircraft OEM margins are rising.
 - How and why the margins of tier-1 suppliers are rising.
- Key strategies of aerostructures suppliers, including:
 - What is the trend in using low cost countries? What is the economic case?
 - What countervailing arguments e.g. setting up next to customers, automating?
 - Which suppliers are targeting a product specialty, and/or a process specialisation, and why?
 - Consolidation: history, recent deals, what's in the pipeline?
 - 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 and/or digitisation.
 - Diversifying into other markets.

The report provides profiles of 186 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 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:

- Aerospace actuation 2018
- Aerospace composites 2018
- Aircraft Interiors 2018
- Aero-engine and IGT components 2017
- Tooling & automated assembly for aerostructures 2017
- Airborne Pods 2016
- Mini reports;
 - Aerospace Sensors 2019
 - Aerospace Environmental Control Systems 2018
 - Aircraft Harnesses and Electrical Standard Parts 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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