

Aerostructures 2021

The 17th annual review of the world aerostructures market from
Counterpoint Market Intelligence Limited

Why buy this 800-page report?

Because the aerostructures supply chain is at the heart of the turmoil currently being experienced in the aerospace supply chain, which we think will be the catalyst for a period of radical change. This will be caused by the aircraft OEMs' changing aerostructures sourcing strategies, and continuing capital investment requirements in what has now become a capital-intensive sector.

We have been analysing the market for a long time, both in the manufacturing sector and now, over the last 17 years, as analysts. For these reasons we believe that we are well placed to describe the current landscape, identify trends, and advise on emerging threats and opportunities.

- Our 2021 report also offers comprehensive market analysis including:
 - The estimated segmentation of this \$45 billion market (down from \$68 billion in 2019), including:
 - 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
 - 10-year forecasts with three scenarios for COVID-19 pandemic recovery.
 - Market shares by the segments described above
- Market trends and key characteristics
 - Outsourcing by the aircraft OEMs
 - Competitive background by segment and sub segment
 - Composite materials and technology: e.g., thermoplastics, out-of-autoclave, automation.
 - The fight-back of metal: new alloys; new metal forming/joining; additive manufacturing
 - The role of governments: e.g., share ownership, R&T, offset, environmental
 - The evolving role of China
- How do aerostructure firms respond to this marketplace?
 - Survival in the short term.
 - Industry consolidation, including analysis of M&A activity.
 - The increasing role of private equity/financial buyers.
 - Reported aerostructures profitability, and analysis.
- 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?
 - Who's doing what in automation e.g., AFP/ATL, robotics, digitisation?
 - Building a product-based business
 - Diversification

The report provides profiles of 192 companies. Our 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.

CONTENTS

1. Summary
2. What is an aerostructure?
 - 2.1. Primary and secondary structure
 - 2.2. Aerostructure definition
 - 2.3. The main aerostructures product segments
 - 2.3.1. Wings and wing components
 - 2.3.2. Fuselage structures
 - 2.3.3. Empennages
 - 2.3.4. Nacelles and pylons
 - 2.3.5. Fabricated parts
3. Methodology
 - 3.1. Sources of information
 - 3.2. Our market model
 - 3.3. Company profiles and analysis of trends
4. The impact of Covid-19
5. Market size and shape
 - 5.1. Market size and growth
 - 5.2. Market growth
 - 5.3. Overall industrial structure
6. Market share analysis
 - 6.1. Market share held by aircraft OEMs
 - 6.2. Market share held by Tier 1 suppliers
 - 6.3. Tier 1 sales by region
 - 6.4. Market segmentation by type of structure
 - 6.5. Wing market shares
 - 6.6. Fuselage market shares
 - 6.7. Nacelle and pylon market shares
 - 6.8. Empennage market shares
7. Market sub-segments - competitive background
 - 7.1. Wings and wing components
 - 7.2. Fuselage structures
 - 7.2.1. Doors
 - 7.3. Empennages
 - 7.4. Nacelles and pylons
8. Aerostructures market split by aircraft sector
9. The composite aerostructures market
 - 9.1. composites aerostructures market size and growth
 - 9.2. Who has been getting the business – market shares
 - 9.3. The growth history of composites
10. Titanium aerostructures
11. Technology
 - 11.1. The historic debate – metal versus composites
 - 11.2. New composites technologies for the next generation of aircraft
 - 11.2.1. Out-of-Autoclave (OOA)
 - 11.2.2. Thermoplastics
 - 11.2.3. Knitting, braiding, weaving and Z-pinning
 - 11.2.4. Integrated composite parts
 - 11.2.5. Composite recycling
 - 11.3. Automation
 - 11.4. Fibre Metal Laminates – a third structures material?

- 11.5. Metal fights back against composites mainly with new alloys
- 11.6. New metal forming and joining techniques
- 11.7. Additive manufacturing (AM OR 3-D printing)
- 11.8. Digitisation and Industry 4.0
- 11.9. State and supra-state Funding of R&T
- 11.10. Other State funding
- 12. Characteristics of the aerostructures market
 - 12.1. Deflationary pressures in large commercial
 - 12.2. Company failures
 - 12.3. Financial performance
 - 12.3.1. Reported aerostructures profitability
 - 12.3.2. General factors affecting profitability
 - 12.3.3. Difference between design-and-build and build-to-print
 - 12.4. Contract awards since January 2020
 - 12.5. Historical Consolidation in a Still Very Fragmented Market
 - 12.5.1. Consolidation among suppliers
 - 12.5.2. The increasing role of private equity/financial buyers
 - 12.5.3. Some consequences of excessive fragmentation
 - 12.6. Aircraft OEMs' level of outsourcing versus in-house manufacturing
 - 12.6.1. Aircraft OEMs
 - 12.6.2. Airbus
 - 12.6.3. Boeing
 - 12.6.4. Bombardier
 - 12.6.5. Embraer
 - 12.6.6. Gulfstream
 - 12.6.7. Lockheed Martin
 - 12.6.8. China and Russia
 - 12.6.9. Other aircraft OEMs
 - 12.7. Trends in design and build
 - 12.8. The effects of government regulation
 - 12.9. Stuffing of airframes
 - 12.10. The role of China
- 13. How do aerospace firms respond to this marketplace?
 - 13.1. Survival in the short term
 - 13.2. Refocus on defence work
 - 13.3. Plant closures
 - 13.4. How much and why manufacture in LOW-COST countries 'LCC'
 - 13.4.1. Which types of structure go to low-cost countries?
 - 13.4.2. What is the economic case for using a low-cost country?
 - 13.4.3. Can the West compete against low-cost countries?
 - 13.4.4. How do suppliers use low-cost countries?
 - 13.4.5. Sub-contracting to low-cost countries is an alternative
 - 13.5. Gain leverage with Aircraft OEMs from being local
 - 13.5.1. Proximity to Airbus
 - 13.5.2. Proximity to Boeing
 - 13.5.3. Proximity to Bombardier
 - 13.5.4. Proximity to Embraer
 - 13.5.5. Other instances of proximity to aircraft OEMs and super tier-1s
 - 13.6. Dollarisation
 - 13.7. Building a product-based business
 - 13.8. Process specialists
 - 13.9. Consolidation and other M&A moves
 - 13.10. Move up the food chain
 - 13.11. Investment in new capacity

- 13.12. Diversification 232
- 14. Profiles of aerostructures companies – aircraft OEMs
36 profiles
- 15. Profiles of aerostructures companies - Tier 1s and Tier 2s
 - 15.1 North American suppliers
62 profiles
 - 15.2 European suppliers
53 profiles
 - 15.3 Asian suppliers
34 profiles
 - 15.4 Suppliers ROW
7 profiles
- 16. Appendix - ATA Chapters
- 17. Appendix - Three categories of composites companies
- 18. 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 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 composites 2021
- Avionics 2021
- Aero-engine Maintenance, Repair and Overhaul 2021
- Aero-engine and IGT components 2020
- Aircraft interiors 2020
- Aerospace Actuation 2020
- Aerospace Environmental and Thermal Control Systems 2020
- Electrical Power Systems 2020
- Engine Controls and Health Monitoring 2020
- Aircraft Harnesses and Electrical Standard Parts 2020
- Aircraft Fluid Conveyance 2019
- Aerospace Sensors 2019
- Aerospace Valves 2019
- Aerospace Machining 2019
- Tooling & automated assembly for aerostructures 2017

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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