

Aircraft Interiors 2017

The fourth report on this market from
Counterpoint Market Intelligence Limited

The ever-increasing demands of passengers and the airlines who serve them for new products and a better flying experience continues to drive innovation in Aircraft Interiors.

Meeting these demands has proven to be a challenge for even the biggest industry players, and has led to calls for a structural change in the supply chain from the Aircraft Manufactures.

However, the sector produces returns well-above the industry average for those who get it right, and this has attracted a multitude of fresh ideas from the smallest of start-ups to an automotive giant.

In response, the two largest interiors companies have both been bought within the last year by aircraft equipment companies. This should bring yet more expertise and investment into what is already a highly dynamic and exciting sector

This is Counterpoint's fourth report on the aircraft interiors industry. As before, our team for this report continues to include Ben Bettell, who brings with him 35+ years of experience in the interiors sector.

Our new 433-page report offers the following market analysis;

- The estimated growth in this \$14.6 billion market over the next 10 years.
- How the market segments by:
 - o All aircraft types: i.e. Airbus, ATR, Boeing...through to Sukhoi SuperJet
 - o OE, aftermarket (retrofit) and spares
- Market shares in each sector:
 - o Seats (identified by seat class)
 - o Galleys & Galley inserts
 - o Lavatories
 - o Crew rest compartments
 - o Monuments
 - o Cabin lighting
 - o Interior panels
 - o Overhead luggage bins
 - o Floor coverings
 - o In-flight entertainment & Connectivity (now analysed separately from IFE)

We analyse demand drivers, including;

- Line fit
- Retrofit
- Replacement cycles
- The airlines' search for differentiation to improve the passenger experience

We describe the market and its key characteristics;

- How the SFE model is maturing and the aircraft OEMs' desire to attract new suppliers
- The scope for (and experience of) new entrants and which sectors they are targeting
- The continuing evolution of seating classes
- Technology change
- Why IFEC has the fastest growth of the eleven sectors we analyse

We analyse the strategies being pursued by suppliers;

- E.g. technology differentiation, aesthetics, product range expansion, use of low cost countries.
- The achievements of successful consolidators over the last 20 years

The report provides profiles of 147 companies. Our profiles cover;

- Origins and ownership; Our estimate of sales; plus financials if obtainable; Operations and technology; Customers and contracts; Strategy; Recent Developments; Our comments

We offer purchasers of this report a one-hour free teleconference to discuss any aspects of this report.

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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:

- Aerostructures 2017
- Aero-engine and IGT components 2017
- Tooling & automated assembly for aerostructures 2017
- Aerospace Actuation 2016
- Airborne Pods 2016
- Mini reports;
 - Aerospace valves 2017
 - Aircraft fluid conveyance 2017
 - Aerospace Machining 2016
 - Environmental control systems 2015
 - Engine controls and fuel systems 2015
 - Aerospace ball screws 2015
 - Aircraft harnesses and electrical standard parts 2015
 - Stuffing for airframes 2015

Counterpoint Market Intelligence Limited also undertakes 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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