

Tooling & automated assembly for aerostructures 2017

The sixth report on tooling for aerostructures from
Counterpoint Market Intelligence Limited

Counterpoint has released its sixth report on the aerostructures tooling market. We see relative growth for automated assembly and composites-forming, though the total market, which is mainly linked to new programme starts, is in decline.

Our new 155-page report offers the following market analysis;

- Market size and 10-year growth forecasts segmented by;
 - Composites forming
 - Metal forming
 - Component assembly
 - Final/major assembly
 - civil/military split
- Areas of relative growth e.g. automated assembly & composites forming
- Detailed modelling; including a forecast of current and future tooling NRC by programme, a timeline depicting the phasing of tooling spend, and a breakdown of composite tooling, metal tooling component assembly and final/major assembly tooling by programme
- The key determinants of market growth;
 - The number and timing of planned new programmes
 - The scope for future automation - where are we on the curve for different classes of user?
- Shape of the market;
 - How the market is divided amongst: systems integrators/automation companies, international and local suppliers
 - Frequency distribution of company sizes & customer orientation of tooling suppliers
 - Extent to which outsourcing by aircraft OEMs and large tier-1s is occurring
 - the role of integrators.
- Analysis of market size and shares for the following product segments: total market; tooling for composites forming; tooling for final/major assembly; and materials for tooling made out of composites
- Insights from our interviews with key players at all levels of the tooling market

We analyse key characteristics and trends including;

- Tooling materials and technologies (e.g. invar, composites) and their impact on tooling cost
- Procurement issues: the location of the supply chain; the importance of local suppliers; globalisation of tooling procurement; the trend towards larger contract responsibilities; ways in which the aircraft OEMs influence their suppliers' approach to tooling
- The impact of additive manufacturing
- Profitability; analysis of reported results and our views on margin trajectory for suppliers
- M&A and consolidation

The report provides profiles of 64 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 would be pleased to provide an hour's free consultancy to purchasers of this report.

CONTENTS

1. Summary
2. Glossary
3. Methodology
4. Aerospace tooling market analysis
 - 4.1. What is tooling?
 - 4.2. Overall size of the aerostructures tooling market in 2016
 - 4.2.1. Split of tooling spend: parts/assembly and composites/metal
 - 4.2.2. Market size – an informal and alternative approach
 - 4.2.3. Breakdown of tooling spend by category
 - 4.3. Market growth
 - 4.4. Demand drivers
 - 4.5. Tooling for composite aerostructures
 - 4.6. Breakdown of spend on composite tooling
 - 4.7. Some sub-sectors are seeing above trend performance
 - 4.7.1. Automation systems
 - 4.7.2. Proportion of assembly tooling that is for automation
 - 4.7.3. Composite tooling for composites
 - 4.8. Civil/military aerospace split
 - 4.9. Incidence and timing of upcoming key programmes
 - 4.10. Aircraft and aerostructures NRC
 - 4.10.1. Size of tooling as a proportion of total NRC
 - 4.11. Phasing of tooling spend by key programme
 - 4.12. Shape and classification of the tooling spend profile
 - 4.13. Breakdown of tooling by programme
 - 4.14. Major contract wins since January 2015
5. Market shares
 - 5.1. What types of company supply tooling?
 - 5.2. Market position of the key integrators – analysis of public data
 - 5.3. Market positions in traditional tooling
 - 5.4. Market shares
 - 5.4.1. Overall tooling market shares
 - 5.4.2. Final/major assembly tooling
 - 5.4.3. Tooling for composite and metal aerostructures
 - 5.4.4. Specialist composite tooling material suppliers
6. Tooling materials and technologies
 - 6.1. Tooling made from metal
 - 6.2. Composite tooling materials
 - 6.3. The impact on tooling cost
 - 6.4. Tooling for RTM
 - 6.5. Additive manufacturing – a long-term threat?
7. Market structure
 - 7.1. Size distribution of tooling suppliers
 - 7.2. Customer focus
 - 7.3. How much tooling is outsourced by aerostructures companies?
 - 7.4. Where is the supply chain?
 - 7.5. Aerostructures tooling in the BRIC countries
 - 7.6. The trend towards larger contract responsibilities
 - 7.7. Ways in which aircraft OEMs influence suppliers' approach to tooling
8. The role of governments
 - 8.1. Offset
 - 8.2. Infrastructure support
9. Margin trajectory
10. Tooling supplier strategies

- 10.1. M&A moves – a summary
- 11. Profiles of key players in tooling
 - 11.1. Tooling integrators and automation systems suppliers
12 Company profiles
 - 11.2. International tooling suppliers
2 Company profiles
 - 11.3. Local suppliers – North America
18 Company profiles
 - 11.4. Local suppliers – Europe
13 Company profiles
 - 11.5. Local suppliers – Rest of the world
6 Company profiles
 - 11.6. Specialist material suppliers
6 Company profiles
 - 11.7. Aerostructures companies with in-house tooling
7 Company profiles
- 12. 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:

- Aero-engine and IGT components 2017
- Aerostructures 2017
- Aircraft interiors 2016
- Aerospace Actuation 2016
- Aerospace Valves 2017
- Aircraft Fluid Conveyance 2017
- Airborne Pods 2016
- 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

Please contact us using the contact details below or email us on enquiries@cpmil.com.

George Burton	Tel: +44 (0)1747 852805	Richard Apps	Tel: +44 (0)1235 868051
	Mobile: +44 (0)7770 982153		Mobile: +44 (0)7741 035969
	e-mail: georgeburton@cpmil.com		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).