

Tooling & automated assembly for aerostructures 2021

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

Counterpoint has released its seventh report on the aerostructures tooling market, including a major update of our tooling market model. This is still a challenging market, but we see relative growth in automation and composite tooling.

Our new 145-page report offers the following market analysis:

- Market size and 10-year growth forecasts under three Covid recovery scenarios segmented by:
 - Tool design
 - Metal forming
 - Composite forming
 - Component assembly
 - Final/major assembly
- Demand over the next 10 years segmented by:
 - source of demand e.g., clean sheet design, derivatives etc.
 - aerostructure type e.g., wing, fuselage etc.
 - type of tooling spending e.g., NRC, rate tooling, tooling maintenance, consumable tools, upgrades
 - aircraft type e.g., large commercial, business jet etc.
- Areas of relative growth e.g., automated assembly & composites forming and the use of composite tools
- Shape of the market:
 - Civil and military split
 - Key aircraft programmes
 - Extent to which outsourcing by aircraft OEMs and large tier-1s is occurring
 - Geographical analysis.
- Analysis of market size and shares for the following product segments: total market; tooling for final/major assembly; tooling for composites and metal aerostructures; and materials for tooling made out of composites

We analyse key characteristics and trends including:

- Tooling materials and technologies (e.g., hybrids, composites)
- 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 margins suppliers
- Tooling supplier strategies
- M&A and consolidation

The report provides profiles of 48 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 2019 & 2020
 - 4.2.1. Split of tooling spend; parts/assembly and composites/metal
 - 4.2.2. 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 Aerostructures
 - 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. Tooling segmentation
 - 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 2018
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. Tooling for RTM
 - 6.4. 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 emerging aerospace 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. Profitability

- 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
11 Company profiles
 - 11.2. International tooling suppliers
2 Company profiles
 - 11.3. Local suppliers – North America
14 Company profiles
 - 11.4. Local suppliers – Europe
8 Company profiles
 - 11.5. Local suppliers – Rest of the world
5 Company profiles
 - 11.6. Specialist material suppliers
5 Company profiles
 - 11.7. Aerostructures companies with in-house tooling
3 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, the Counterpoint team has over 50 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:

- Aerostructures 2021
- Aerospace composites 2021
- Avionics 2021
- Aero-engine Maintenance, Repair and Overhaul 2021
- Landing gear 2021
- Aircraft Fluid Conveyance 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
- Aerospace Sensors 2019
- Aerospace Valves 2019
- Aerospace Machining 2019

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

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

Richard Apps Tel: +44 (0)1235 868051
 Mobile: +44 (0)7741 035969
 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

Use

Single Site Licence: This report may be used by an unlimited number of people within the same site. Each of these people may use the report on any computer, and may print out the report, but may not share the report (or any information contained therein) with any person or persons outside that site without the written approval of Counterpoint Market Intelligence Limited.

Group Licence: This report may be used by an unlimited number of people within the same group of companies. Users must not share the report (or any information contained therein) with any person or persons outside that group of companies without the written approval of Counterpoint Market Intelligence Limited.

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

All intellectual property rights, including but not limited to copyright, shall remain the property of Counterpoint Market Intelligence Limited or any third-party licensors.

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).