

# Aerospace Actuation 2008

*Looks fragmented but market power is rapidly concentrating*

## Counterpoint Market Intelligence Limited

### **Why buy this report?**

Actuation is a very significant aerospace equipment sector in which 60+ companies have enjoyed a profitable existence, each able to bid for a range of actuators employed on various parts of the aircraft. However, in the very recent past there has been a radical transformation of this market, almost unseen outside the sector, with just a very few companies assuming much more extensive responsibility for complete actuation systems on the key high volume programmes. We predict therefore that the top half dozen companies will account for an increasing proportion of the market.

### **This report analyses this transformation and considers the implications.**

We analyse the 63 companies that we cover to estimate:

- Total size of the market and market shares
- Market shares in each product group: Primary flight controls; High lift systems; Secondary flight controls; Landing gear actuation; Thrust reverser actuation; Engine controls; Seats; Propellers; Other utilities; Weapons release; Missiles
- The growing share of electric actuation
- The shape of the market:
  - Value of product segments
  - Frequency distribution by company sales band
  - The size of the four market tiers we identify
  - The use that suppliers make of low cost operations
  - The split between design and make-to-print
- Split of the market between civil and military OE
- Split in the market between OE and aftermarket
- Growth in the market over 10 years

### **The report provides profiles of 63 companies. Our new expanded profiles cover;**

- Origins and ownership
- Our estimate of aerospace actuation sales, plus financials if obtainable
- Operations and technologies
- Customers and contracts
- Strategy

### **Our report analyses technology and procurement trends, industry profitability and state-funded R&D programmes in the US and Europe.**

**We offer purchasers of our report a free teleconference to discuss any aspects of it.**

**November 2008**

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## Why Counterpoint Market Intelligence?

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 38 years of experience in senior positions in aerostructures, engine components, and aerospace equipment. Counterpoint now has an international business, with 70% of sales outside the UK. Sales of research reports have led to consultancy projects, mainly M&A-related. 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 2008
- Tooling for aerostructures 2008 - *Substantial growth in prospect*
- Aeroengine and IGT components 2007
- Who pays, who wins - *The role of the state in the funding of aerospace*
- European military aircraft and equipment MRO 2006 - *What this €13billion market looks like now, how it's changing and how companies identify and win business*

Counterpoint Market Intelligence Limited also undertakes bespoke consultancy studies for its clients in areas including the following:

- Market and strategy-related due diligence for M&A
- Acquisitions search
- Evaluation of strategic options

## Price for Aerospace actuation 2008

The price is £3,000.00 plus VAT at the standard rate for customers in the UK, £3,000.00 with VAT at zero rate for customers in the rest of the EU, and £3,000.00 for customers in countries outside the scope of VAT. **Customers of our previous aerospace actuation report will receive a 33% discount.**

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