

Aerospace Composites 2022

The fifth review of the world aerospace composites market
from Counterpoint Market Intelligence Limited

Why buy this 600-page report?

Because at this time of unprecedented supply chain pressure, we offer rigorous and insightful market analysis within the aerospace composites market sector from raw material to end applications in aerostructures, engine components and cabin interiors. Market share of suppliers throughout the value chain were significantly affected by their exposure to military vs civil programmes, as well as their exposure to Airbus vs Boeing. Raw material price inflation also affected suppliers' profitability, with Tier2s at the centre of the crisis.

Our 2022 report offers comprehensive quantitative market analysis including:

- Comparisons of the market in 2020 and 2021 showing the recovery of different market sectors post-pandemic.
- 10-year growth forecasts by material and by market sectors.
- Market sizes and market shares
 - By material
 - Carbon, aramid and glass fibre market
 - Thermoset and thermoplastic resin market
 - Intermediate product market
 - Honeycomb core
 - By application segment
 - Aerostructures
 - Cabin interiors
 - Engine components
 - Aerostructures tooling

Trends in the raw/intermediate material market

- Increase in raw material price and the effect to supply chain
- Carbon fibre production expansion and new intermediate products
- Large-tow carbon fibre for aerospace applications
- The rise of thermoplastic composites and welding technology
- Automation - tow steering and tow shearing
- Materials for Out-of-autoclave and additive manufacturing
- Material suppliers' activities in composite recycling
- Material suppliers' reactions to the emerging UAM market.

Technology trends in aerostructures and engine components

- Development in Out-of-autoclave and AFP/ATL technologies and 10-year growth trend by major programmes.
- Current applications and R&D trend in thermoplastic composites by suppliers
- Integrated composite parts; applications and developments
- Aerostructure manufacturers' reaction to the emerging UAM market
- Development in composite hydrogen storage and fuel cells

Technology trends in cabin interiors

- Recycling of composites; who has the initiative and the current participants in the supply chain.
- Development in Biocomposites for interior applications
- Additive manufacturing for interior applications

Technology trends in Tooling

- Composite tools for composite manufacturing. Hybrid tooling materials
- Additive manufacturing for composite tools

The report provides full profiles of 122 companies (including 39 SMEs). Our profiles cover:

- Origins and ownership; Our estimate of aerospace composite related 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 one-hour free teleconference to discuss any aspects of it.

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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.

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- Aerospace Sensors 2022
- Aircraft interiors 2021
- Avionics 2021
- Aero-engine Maintenance, Repair and Overhaul 2021
- Landing gear 2021
- Aircraft Fluid Conveyance 2021
- Aero-engine and IGT components 2021
- Aerospace Valves 2021
- Aerospace Machining 2021
- Tooling & automated assembly for aerostructures 2021
- 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

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

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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

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