

Aerostructures 2021

The 17th annual review of the world aerostructures market from
Counterpoint Market Intelligence Limited

Why buy this 800-page report?

Because the aerostructures supply chain is at the heart of the turmoil currently being experienced in the aerospace supply chain, which we think will be the catalyst for a period of radical change. This will be caused by the aircraft OEMs' changing aerostructures sourcing strategies, and continuing capital investment requirements in what has now become a capital-intensive sector.

We have been analysing the market for a long time, both in the manufacturing sector and now, over the last 17 years, as analysts. For these reasons we believe that we are well placed to describe the current landscape, identify trends, and advise on emerging threats and opportunities.

- Our 2021 report also offers comprehensive market analysis including:
 - The estimated segmentation of this \$44 billion market (down from \$67 billion in 2019), including:
 - composite, titanium and other metallic structures
 - Civil and military: OE production, spares and modifications
 - Generic aircraft type: e.g. large commercial, regional, business, helicopters
 - Aerostructures product type: wings, fuselage, nacelles & pylons, empennage
 - Market tier: super tier-1, tier-1, tier-2; the value of sales at different points in the supply chain
 - 10-year forecasts with three scenarios for COVID-19 pandemic recovery.
 - Market shares by the segments described above
- Market trends and key characteristics
 - Outsourcing by the aircraft OEMs
 - Competitive background by segment and sub segment
 - Composite materials and technology: e.g., thermoplastics, out-of-autoclave, automation.
 - The fight-back of metal: new alloys; new metal forming/joining; additive manufacturing
 - The role of governments: e.g., share ownership, R&T, offset, environmental
 - The evolving role of China
- How do aerostructure firms respond to this marketplace?
 - Survival in the short term.
 - Industry consolidation, including analysis of M&A activity.
 - The increasing role of private equity/financial buyers.
 - Reported aerostructures profitability, and analysis.
- Key strategies of aerostructures suppliers, including:
 - What is the trend in using low cost countries? What is the economic case?
 - What countervailing arguments e.g., setting up next to customers, automating?
 - Who's doing what in automation e.g., AFP/ATL, robotics, digitisation?
 - Building a product-based business
 - Diversification

The report provides profiles of 192 companies. Our profiles cover:

- Origins and ownership; Our estimate of aerostructures 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 free teleconference to discuss any aspects.

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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 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:

- Aerospace composites 2021
- Avionics 2021
- Aero-engine Maintenance, Repair and Overhaul 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
- Aircraft Fluid Conveyance 2019
- Aerospace Sensors 2019
- Aerospace Valves 2019
- Aerospace Machining 2019
- Tooling & automated assembly for aerostructures 2017

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

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