

Aerostructures 2023

The 19th annual review of the world aerostructures market from
Counterpoint Market Intelligence Limited

Why buy this 765-page report?

The aerostructures supply chain is continuing to evolve and the pandemic has served to accelerate change and highlight vulnerabilities. In addition, the world is now subject to much greater political risks, all of which are prompting change. This will include the aircraft OEMs' changing aerostructures sourcing strategies, and continuing challenges around supply chain resilience, with the longer-term uncertainty around possible new propulsion systems and aircraft configurations.

We have been analysing the market for a long time, both in the manufacturing sector and now, over the last 19 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 2023 report also offers comprehensive market analysis including:

- Overall market size, growth and market shares in 2022:
 - The estimated segmentation of this \$48 billion market (up from \$42 billion in 2021), 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 segmented market forecasts
 - Market shares by the product segments described above
- Composite aerostructures market analysis:
 - Market size, segmentation and growth forecast
 - Market shares
- Technology
 - New developments in composites and metals technology including:
 - Thermoplastics
 - Composites recycling
 - Additive manufacturing
 - Automation and industry 4.0
 - Government and state-funded R&T programmes
- Market trends and key characteristics
 - Financial performance, including reported aerostructures profitability, and analysis
 - Industry consolidation, including analysis of M&A activity.
 - Competitive background by segment and sub segment
 - The move to more insourcing by the aircraft OEMs and large tier-1s
 - The continuing role of Low Cost Countries
 - The changing role of China

The report provides profiles of 193 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, the Counterpoint team has over 50 years of experience in senior positions in aerostructures, interiors, 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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- Aircraft Interiors 2022
- Aerospace Actuation 2022
- Aerospace Sensors 2022
- 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
- Electrical Power Systems 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

How to buy the report

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