

Aerostructures 2020

The 16th annual review of the world aerostructures market from
Counterpoint Market Intelligence Limited

Why buy this 780-page report?

Because the aerostructures supply chain is about to enter a period of radical and unprecedented change. This will be caused mainly by reducing volume but also by continued capital investment 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 15 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 2020 report also offers comprehensive market analysis including:

- The estimated segmentation of, this \$66 billion market, 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, which show the impact of the COVID-19 pandemic on the industry. We compare these to our pre-Covid-19 forecast as a reference.**
- Customer orientation of suppliers; supplier numbers in each tier
- Market trends and its key characteristics
 - How the aircraft OEMs are viewing outsourcing
 - Competitive background by segment and sub segment
 - Evolution of composite materials and technology: thermoplastics, out-of-autoclave, lay-up rates.
 - Analysis of the structure of the composites supply chain and assessment of entry barriers
 - The role of governments: share ownership, R&T, offset, environmental, infrastructure support.
 - The evolving role of China
- Analysis of financial returns:
 - How the sales of aircraft OEMs and tier-1 aerostructures companies have been growing relative to the volume of aerostructures manufactured, measured by weight.
 - How and why aircraft OEM margins have been rising.
 - How and why the margins of tier-1 suppliers have been rising.
- 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?
 - Which suppliers are targeting a product specialty, and/or a process specialisation, and why?
 - Consolidation: history, recent deals, what's in the pipeline?
 - Who's doing what in automation e.g. AFP/ATL and robotics?
 - The fight-back of metal: new alloys; new metal forming/joining; additive manufacturing
 - Investing in new manufacturing capacity and/or digitisation.

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:

- Aero-Engine and IGT components 2020
- Aircraft interiors 2019
- Aerospace composites 2019
- Aerospace actuation 2018
- Tooling & automated assembly for aerostructures 2017
- Mini reports;
 - 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
 - Aerospace Environmental Control Systems 2018
 - Aerospace ball screws 2015
 - Stuffing for airframes 2015

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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