

Global Markets for Advanced Aerospace Materials

<https://marketpublishers.com/r/G6B85C5986EAEN.html>

Date: November 2023

Pages: 251

Price: US\$ 5,500.00 (Single User License)

ID: G6B85C5986EAEN

Abstracts

Report Scope:

This report examines the emerging materials in the aerospace industry. Definitive and detailed estimates and forecasts of the global market are provided, followed by a detailed analysis of each material, application and regions. The report also focuses on the regulations, relevant industry organizations and government-supported programs impacting this market. Regionally, the focus of the study will be the markets of the Americas, Europe and Asia-Pacific. BCC Research has not considered the rest of the world in its research scope because the major contributions and developments in emerging materials in the aerospace sector is from the Americas, Europe and Asia-Pacific only.

The scope of the advanced aerospace materials industry is continually expanding as new discoveries are made and as researchers and industries explore innovative ways to harness the unique properties of advanced materials and manufacturing technologies. This report, however, concentrates on emerging materials that are currently in commercial use or are likely to be commercialized by 2028. Other applications that, while promising, are not likely to make it out of the laboratory by 2028 are not covered in depth. Sales value estimates are based on prices in the supply chain. Market-driving forces and industry structures are examined. International aspects are analyzed for all global regions.

This study reviews the following material categories, along with relevant market and production information, technological descriptions and issues, key applications and major market factors. This report organizes material type into the following segments

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Advanced steel alloys.

Advanced aluminum alloys.

Titanium alloys.

Superalloys.

Advanced composites—CFRP, GFRP.

Ceramic-matrix composites.

Advanced adhesives.

The following applications for advanced aerospace materials are also examined, with market breakdowns for each by region:

Commercial passenger aircraft.

Commercial transport aircraft (for cargo).

Aviation.

Others.

Industry and government.

Commercial space industry.

Emerging technologies of interest—including those that could someday capture significant market share—that have not yet developed to the point of achieving significant market share. Listed below are some technologies that are not yet commercialized but do not meet the definition of advanced aerospace materials considered in this study.

Aluminum, carbon steel and other conventional metals that are used in some cases for basic structural

Interior panels and other non-structural cabin elements that use conventional materials.

aluminum alloys are considered in this study).

The research in support of this study was developed over two phases. The initial phase of the analysis included a review of aerospace materials under study, as well as a review of the industry trends and factors likely to influence development and growth potential. Regional markets were in many cases variable for this study. In the second phase, the analysis was on sales of advanced aerospace materials with respect to a specific end use. Market values were developed based on trade volumes for each of the categories considered, to the extent that this data was available. Market values were then developed using typical pricing for each of the advanced aerospace materials categories that

It should be noted that the study did not consider the ultimate final end-product value. For example, BCC considers the value of an airplane that is sold by Boeing to American Airlines. Instead, we consider the value of the components that are included in the airplane, based on their purchase cost by Boeing. The market values shown are current values and they discount the effects of past or future inflation on market values.

Where market data was developed, application-level data was cross-referenced against the technology data. Market values were estimated based on future anticipated deployment and potential for changes in leading and secondary markets. Where developed country-level splits based on a combination of regional and national level sales and data were not available, country-level splits were estimated for segments where national-level data was limited or unavailable. Market values were based on the available technology and application-level data, and then benchmarked against other

the global markets for advanced aerospace materials

with historical market revenue data (sales figures) for 2022, estimates for 2023, and projections of market revenue (in US\$) through 2028

and a revenue forecast for the global advanced aerospace materials market, and corresponding market revenue by region, and region

pertaining to the market growth drivers, opportunities and challenges, upcoming technologies, future market trends, and impacts of macroeconomic variables

opportunities with a holistic review of Porter's five forces model and PESTLE analyses considering the factors prevailing in the market

factors in emerging materials in the aerospace industry, with emphasis on consumer attitudes, ESG and ESG practices followed

focus on emerging materials in the aerospace industry

the worldwide market for advanced aerospace materials along with an analysis of the structure of the industry and recent mergers and acquisitions (M&A) activity

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AMETEK INC.

ARCONIC

AUBERT & DUVAL

BASF SE

BEIJING BEIYE FUNCTIONAL MATERIALS CORP.

CARPENTER TECHNOLOGY CORP.

CONSTELLIUM SE

DONCASTERS GROUP

DUPONT DE NEMOURS INC.

FORT WAYNE METALS

GFE GESELLSCHAFT FUR ELEKTROMETALLURGIE MBH

HAYNES INTERNATIONAL INC.

HEXCEL CORP.

HIGH PERFORMANCE ALLOYS INC.

JIANGYOU CHANGCHENG SPECIAL STEEL CO. LTD.
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