Non-Automotive Transportation Market for Connectors

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Abstracts

Bishop & Associates, Inc. has released a new 10-chapter, 253-page research report, providing a detailed analysis of the non-automotive transportation market for connectors. This new report explores the various sectors and sub-sectors of this marketplace, as well as the connector types used within these sectors.

Sectors discussed in this report include:

Commercial Air

Rail & Rolling Stock

Commercial Vehicles

Commercial Marine

Heavy Equipment

Recreation & Power Sport Vehicles

Market values and forecasts covering the period 2019 through 2025F are provided, along with five-year CAGR figures by region of the world, sector and sub-sector.

The non-automotive transportation market includes most vehicles and forms of transportation, except for passenger cars and light trucks and vans. Each of these forms of transportation is designed and engineered to best suit the medium in which it operates: rail, road (on-road and off-road), air, or sea. On one hand, the transportation market is a very diverse market segment which includes huge oil tankers, rolling stock and locomotives, heavy trucks, and construction machinery, as well as commercial jets, ATVs and small recreational vehicles, and farm tractors. On the other hand, these very different vehicles have several things in common:

They are made to carry and/or move either people or payload.

They have a form of propulsion and are powered by an engine or motor.

Until recently, nearly all non-auto vehicles used fossil fuels as their main source of power.

In the past decade, designers of non-auto vehicles have reviewed conventional propulsion systems and have started using cleaner technologies for generating power.

Another aspect that ties all the various forms of transportation together is that data networking (a data bus) has become an essential part of managing and controlling fleet and system operations. This report examines, by transportation mode, the various networking protocols used, and how these networks are altering the transportation sector. In the following graph, the relative size of the connector market within the transportation sector in each region is represented by the size of the bubble. On the x-axis, the average annual compound growth rate (CAGR) of the regional market is plotted over the past 10 years (2009-2019), while on the y-axis, the forecasted five-year CAGR (2020 through 2025) is plotted. This graph shows the Chinese market is poised to outgrow all other regions. As a result, China will become the leading transportation market for connectors in the coming years. North America and Europe are almost equal in size but the North American transportation market for connectors is set to outpace the European market during the forecasted period. Japan, which has experienced several years of declining sales, still lags well behind all other regions

Regulation and standardization are significant factors impacting the transportation industry. Many recent rules and regulations are related to safety and environmental requirements. Most governments, especially those in Europe, Japan, and North America, have set standards for clean air, which impact every vehicle emitting emissions into the atmosphere. China has also started to implement similar requirements. To meet these environmental standards and requirements, engine technology will change, driving early replacement of vehicles or ships with older technology, or non-conforming engines. To meet enhanced safety requirements, increased technology will be implemented, which will also allow operators to detect problems at an early stage. In addition, technology will be added and used to make transportation more efficient. Safety, efficiency, and environmental impact are the three key imperatives driving the transportation industry in the coming years.

Connector consumption in the transportation market sector reached nearly $4.5 billion in 2019, a decrease of 3.8% over 2018, primarily a result of a slowdown in the world economy. The decline was not the same across all sub-sectors, nor is the $4.5 billion evenly distributed across all modes of transportation. Several subsectors, such as commercial marine and rail and rolling stock, performed better than others. At the same time, connector consumption within each subsector varies greatly, with commercial vehicles representing the largest portion of connector consumption and RV and power sports representing the smallest portion. Continued adoption of technologies that will allow OEMs to comply with new rules and regulations regarding emissions and safety requirements, as well as a need to meet efficiency demands and provide an enhanced user experience, will guarantee further growth for connector manufacturers in this market.

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Contents

CHAPTER 1 – INTRODUCTION

Introduction
Air
Sea
Rail
Road
Technology and Connectivity
Connector Consumption by Key Product Category 2018, 2019, and 2020F with Percent Growth

CHAPTER 2 – EXECUTIVE SUMMARY

Executive Summary
Connector Consumption in the Transportation Market by Region 2018 and 2019
Regional Shares of the Transportation Connector Market by Sub-Sector 2019
Connector Consumption in the Transportation Market by Region 2020F and 2025F with Five-Year CAGR and Market Share
Relative Size, 10-Year Historic Growth and Five-Year Forecasted Growth of Connector Sales in the Transportation Market by Region
Civil Aviation
Connector Consumption in Civil Aviation by Region 2019, 2020F, and 2025F with Five-Year CAGR and 2025 Market Share
Marine
Connector Consumption in the Marine Market by Region 2019, 2020F, and 2025F with Five-Year CAGR and 2025 Market Share
Commercial Vehicles
Connector Consumption in the Commercial Vehicles Market by Region 2019, 2020F, and 2025F with Five-Year CAGR and 2025 Market Share
Rail & Rolling Stock
Connector Consumption in the Railway Market by Region 2019, 2020F, and 2025F with Five-Year CAGR and 2025 Market Share
Heavy Equipment
Connector Consumption in the Heavy Equipment and Farm and Garden Market by Region 2019, 2020F, and 2025F with Five-Year CAGR and 2025 Market Share
Recreational and Power Sports Vehicles
Connector Consumption in the Recreational and Power Sport Market by Region 2019,

2020F, and 2025F with Five-Year CAGR and 2025 Market Share

CHAPTER 3 – COMMERCIAL AIR

Market Definition
Aircraft Types and Market Segmentation
Commercial Aircraft – Single Aisle and Wide-Body Airliners
Commercial Aircraft – Regional Aircraft
General Aviation – Private Aircraft and Rotorcraft
Drones and UAV
Simulators and Training
Commercial Spacecraft
Commercial Aircraft: Orders and Deliveries
Commercial Aviation Deliveries and Orders
Boeing
Boeing Aircraft Deliveries 2010-2019
Boeing Net Orders by Model
Airbus
Airbus Aircraft Deliveries 2010-2019
Airbus Aircraft Net Orders 2010-2019
Boeing and Airbus Combined
Boeing and Airbus Deliveries and Orders 2010-2019
Other Commercial Aircraft Manufacturers (OEM)
General Aviation: Orders and Deliveries
General Aviation Shipments 2015-2019E
General Aviation Billings 2016-2019E
US – Manufactured General Aviation Airplane Shipments 2017 – 2018
Europe – Manufactured General Aviation Airplane Shipments 2017 – 2018
Global Production Share 2018 North America and Europe Combined
Other Aviation Segments
Technical Standards and Connector Requirements
Aviation Standards and Governance
Airworthiness and Safety
FAA Parts Manufacturer Approvals (PMA)
ARINC Standards
Connector Consumption in the Civil Aviation Market
Connector Consumption in Civil Aviation by Region 2018 and 2019 with Percent Change and 2019 Market Share
Connector Consumption in Civil Aviation by Region 2019, 2020F, and 2025F with Five-

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Year CAGR and 2025F Market Share
Connector Consumption in Civil Aviation by Product Category 2018, 2019, and 2020F with Percent Change
Top Five Connector Categories Civil Aviation – 2019

CHAPTER 4 – RAILWAY MARKET: ROLLING STOCK, INFRASTRUCTURE, AND SIGNALING

Railway Industry Market Segments, Leading OEMs, and Regions
Leading Rolling Stock and Railway OEMs
Leading Countries/Regions by Total Track Length (2017)
Digital Transformation Trends in Rail Transport
Market Trends in the Global Rail Industry
Average Annual Rail Market Volume 2015-2017 by Segment
Regional Markets
China
Europe
Private Investments in Rolling Stock in Europe Growing
North America
Japan
Asia Pacific
India
South Korea
Malaysia
Row
Russia
South Africa
Locomotive Traction Systems and Technologies
Locomotive Power Sources
Standard-Compliant Technology
Component Certification
Component Certification
Strategic Plans Shaping the Future of the Rail Industry
Signaling and Infrastructure: ERTMS
Signaling and Infrastructure: PTC
How PTC Works
Railway Outlook & Forecast
Railway Regional Outlook
Regional Railways Market for OEM and After Sales Combined for 2017 with 2017

through 2022 Five-Year CAGR
Railway OEM and After Sales Market 2017 with Five-Year (2017 through 2022) CAGR
Leading Railway OEM
Connector Consumption in the Rail & Rolling Stock Market
Connector Consumption in the Rail & Rolling Stock Market by Region 2018 and 2019 with Percent Growth and 2019 Market Share
Connector Consumption in the Rail & Rolling Stock Market by Region 2019, 2020F, and 2025F with Five-Year CAGR and 2025F Market Share
Connector Consumption in the Rail & Rolling Stock Market by Product Category 2018, 2019, and 2020F
Top Five Connector Categories Rail & Rolling Stock – 2019

CHAPTER 5 – COMMERCIAL VEHICLES

Commercial Vehicles Market Segmentation
Market Trends in the Global Commercial Vehicle Industry
Electrification Trends in Commercial Vehicles
European Regulation (EU) 2019/1242
Electric Commercial Vehicles Market Shares
Bus Manufacturers and New Registrations in Western Europe and Poland – 2017 and 2018
Trend of EV Share as Percentage of Sales by Segment through 2040 (BNEF)
Trend of EV Share as Percentage of Sales by Region – Short and Long Term (BNEF)
Natural Gas Vehicles (NGV)
Hydrogen Fuel Cell Technology
The Regulatory Push
Key Regulations by Region
Advanced Electronics for Trucks and Buses – Connected Vehicles
Truck Platooning
Commercial Vehicle Production
Global Production Volume Buses and Coaches 2017 and 2018
Global Production Volume Medium/Heavy Trucks 2017 and 2018
Connector Consumption in the Commercial Vehicles Market
Connector Consumption in the Commercial Vehicles Market by Region 2018 and 2019
Connector Consumption in the Commercial Vehicles Market by Region 2019, 2020F, and 2025 with Five-Year CAGR
Connector Consumption in the Commercial Vehicles Market by Product Category 2018, 2019, and 2020F
Top Five Connector Categories Commercial Vehicles – 2019

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info@marketpublishers.com

CHAPTER 6 – COMMERCIAL MARINE

Commercial Marine Market Overview and Segmentation
World Fleet by Principal Vessel Type – Share of Tonnage (DWT) - 2018
Building, Ownership, Registration and Scrapping of Ships – 2017 Percentage of World Total
Manufacting Time by Transportation Mode
Key Manufacturers in Worldwide Shipbuilding Market
Shipyards: Order Intake in Ships and Value
Components and Systems Certification
Commercial Marine Systems and Applications
Value Chain in Shipbuilding
Engines, Propulsion, and Gears
Navigation, Control, and Communication
Entertainment Solutions
Market Trends in the Global Commercial Marine Industry
Shipping Transitions to a Lower Carbon Future
IMO 2020
Commercial Marine Production Outlook and Forecast
Regional Outlook
North America
Shipbuilding Market Share, Orders, and Deliveries 2017 and 2018 by Country/Region
Orders for Specialized Vessels 2017 and 2018
Global Deliveries versus New Orders in Million DWT Between 2010 and 2019E
Connector Consumption in the Commercial Marine Market
Connector Consumption in the Marine Market by Region 2018 and 2019
Connector Consumption in the Marine Market by Region 2019, 2020F, and 2025F with Five-Year CAGR
Connector Consumption in the Marine Market by Product Category 2018, 2019, and 2020F
Top Five Connector Categories Marine Applications – 2019

CHAPTER 7 – HEAVY EQUIPMENT

Heavy Equipment Market Overview and Segmentation
Construction Equipment Market
Equipment Categories Global Sales Share 2018
Agriculture – Farm Equipment Market

Tractor Registrations in Europe by Country January to June 2018 vs 2019
Mining Equipment Market
2017 Equipment Shares by Mining Application
Market Trends in the Agriculture Equipment Industry
Agribots and Drones
Smart Tractors
ISOBUS: Communication Nodes in Off-highway Vehicle Application
Electric Farm Vehicles
Market Trends in the Construction Equipment Industry
Emission Standards
China
India
Europe
North America
Market Trends in the Mining Equipment Industry
Automation and IoT
Use of Artificial Intelligence
Connector Consumption in the Heavy Equipment Market
Connector Consumption in the Construction Equipment Market by Region 2018 and 2019
Connector Consumption in the Farm and Garden Equipment Market by Region 2018 and 2019
Connector Consumption in the Construction Equipment Market by Region 2019, 2020F, and 2025F with Five-Year CAGR and 2025F Market Share
Connector Consumption in the Farm and Garden Equipment Market by Region 2019, 2020F, and 2025F with Five-Year CAGR and 2025F Market Share
Connector Consumption in the Construction Equipment Market by Product Category 2018, 2019, and 2020F
Connector Consumption in the Farm & Garden Equipment
Market by Product Category 2018, 2019, and 2020F
Top Five Connector Categories Heavy Equipment Market – 2019

CHAPTER 8 – RECREATION AND POWER SPORT VEHICLES

RVs
Motorhomes
Campervans
Towable RVs
Fifth Wheels

Travel Trailers
Pop-Ups
Smart Home Technology to the RV
Regional Analysis
North America
North American RV Sales in Units 2008 through 2018 with Percent Change and 10-Year CAGR
Europe
Touring and Motor Caravans by European Country 2017 and 2018 with Percent Change
China
Asia Pacific
Off-Road Vehicles – ATVs, UTVs, SSVs, and Snowmobiles
Snowmobiles
Snowmobile Sales by Country 2018 and 2019 with Percent Change
ATVs, UTVs, and SSVs
Connector Consumption in the Recreational and Power Sport Vehicles Market
Connector Consumption in the Recreational and Power Sport Vehicles Market by Region 2018 and 2019
Connector Consumption in the Recreational and Power Sport Vehicles Market by Region 2019, 2020F, and 2025F with Five-Year CAGR and 2025F Market Share
Connector Consumption in the Recreational and Power Sport Vehicles Market by Product Category 2018, 2019, and 2020F
Top Five Connector Categories Recreational and Power Sport Vehicles Market – 2019

CHAPTER 9 – TECHNOLOGY OVERVIEW: DATA NETWORKS AND CONNECTOR TYPES

Network Connectivity
Road Vehicles and Heavy Equipment Data Networks
SAE J1939 and CAN Bus
Aircraft Data Networks
Wire Harnesses and Interconnects
Aviation Wire Harness
ARINC
Mil-STD-1553B
ARINC 664 – AFDX - Ethernet
Rail & Rolling Stock Data Networks
ERTMS
Marine and Offshore Data Networks

NMEA 0183
NMEA 2000
Shipboard Internet of Things (IoT)
Connector Technology in the Non-Auto Transportation Industry
Connectors Used in Commercial Vehicles and Heavy Equipment
Agriculture Applications
Connectors Used in Aviation Applications
Commercial Off-the-Shelf Strategy
Build-to-Print – BTP
Build-to-Specification – BTS
ARINC Standard Interconnects
ARINC 404 Series
ARINC 600 Series
ARINC Standard 801-3 Fiber Optic Connectors
MIL-PRF-39012 – RF Connections
MIL-DTL-38999 Circular Connectors
MIL-DTL-83723/Mil-DTL-5015
MIL-DTL-26482
MIL-DTL-5015
MIL-C-39029
Connectors Used in Rail Sector Applications
Connectors Used in Marine Applications

CHAPTER 10 – STATISTICAL OVERVIEW OF THE NON-AUTOMOTIVE TRANSPORTATION MARKET FOR CONNECTORS

Total World
Total World Non-Automotive Transportation Connector Sales by Region 2018 through 2025 with Percent Change and Five-Year CAGR
Total World Non-Automotive Transportation Connector Sales by Region 2020F versus 2025F
Total World Transportation Market Share by Region 2020F
Total World Transportation Market Share by Region 2025F
Total World Non-Automotive Transportation Connector Sales by Sub-Sector 2018 through 2025F with Percent Change and Five-Year CAGR
Total World Transportation Market Share by Sub-Sector 2020F
Total World Transportation Market Share by Sub-Sector 2025F
North American Non-Automotive Transportation Connector Sales by Sub-Sector 2018 through 2025F with Percent Change and Five-Year CAGR

European Non-Automotive Transportation Connector Sales by Sub-Sector 2018 through 2025F with Percent Change and Five-Year CAGR
Japanese Non-Automotive Transportation Connector Sales by Sub-Sector 2018 through 2025F with Percent Change and Five-Year CAGR
Chinese Non-Automotive Transportation Connector Sales by Sub-Sector 2018 through 2025F with Percent Change and Five-Year CAGR
Asia Pacific Non-Automotive Transportation Connector Sales by Sub-Sector 2018 through 2025F with Percent Change and Five-Year CAGR
ROW Non-Automotive Transportation Connector Sales by Sub-Sector 2018 through 2025F with Percent Change and Five-Year CAGR
Total World Transportation Connector Sales by Product Type 2018 through 2025F with Percent Change and Five-Year CAGR
Total World Transportation Market Share by Product Type 2020F
Total World Transportation Market Share by Product Type 2025F
Total World Transportation Connector Sales by Product Type 2020F versus 2025F
North American Transportation Connector Sales by Product Type 2018 through 2025F with Percent Change and Five-Year CAGR
European Transportation Connector Sales by Product Type 2018 through 2025F with Percent Change and Five-Year CAGR
Japanese Transportation Connector Sales by Product Type 2018 through 2025F with Percent Change and Five-Year CAGR
Chinese Transportation Connector Sales by Product Type 2018 through 2025F with Percent Change and Five-Year CAGR
Asia Pacific Transportation Connector Sales by Product Type 2018 through 2025F with Percent Change and Five-Year CAGR
ROW Transportation Connector Sales by Product Type 2018 through 2025F with Percent Change and Five-Year CAGR
Commercial Air
Commercial Air by Region 2018, 2019, and 2020F with Percent Change
Commercial Air by Region 2019, 2020F, and 2025F with Percent Change and Five-Year CAGR
Commercial Air Connector Sales by Region 2020F versus 2025F
Commercial Air by Product Type 2018, 2019, and 2020F with Percent Change
Commercial Air by Product Type 2019, 2020F, and 2025F with Percent Change and Five-Year CAGR
Rail & Rolling Stock
Rail & Rolling Stock by Region 2018, 2019, and 2020F with Percent Change
Rail & Rolling Stock by Region 2019, 2020F, and 2025F with Percent Change and Five-Year CAGR

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Rail & Rolling Stock Connector Sales by Region 2020F versus 2025F
Rail & Rolling Stock by Product Type 2018, 2019, and 2020F with Percent Change
Rail & Rolling Stock by Product Type 2019, 2020F, and 2025F with Percent Change and Five-Year CAGR
Commercial Vehicles
Commercial Vehicles by Region 2018, 2019, and 2020F with Percent Change
Commercial Vehicles by Region 2019, 2020F, and 2025F with Percent Change and Five-Year CAGR
Commercial Vehicles Connector Sales by Region 2020F versus 2025F
Commercial Vehicles by Product Type 2018, 2019, and 2020F with Percent Change
Commercial Vehicles by Product Type 2019, 2020F, and 2025F with Percent Change and Five-Year CAGR
Commercial Marine
Commercial Marine by Region 2018, 2019, and 2020F with Percent Change
Commercial Marine by Region 2019, 2020F, and 2025F with Percent Change and Five-Year CAGR
Commercial Marine Connector Sales by Region 2020F versus 2025F
Commercial Marine by Product Type 2018, 2019, and 2020F with Percent Change
Commercial Marine by Product Type 2019, 2020F, and 2025F with Percent Change and Five-Year CAGR
Heavy Equipment and Farm/Garden
Heavy Equipment and Farm/Garden by Region 2018, 2019, and 2020F with Percent Change
Heavy Equipment and Farm/Garden by Region 2019, 2020F, and 2025F with Percent Change and Five-Year CAGR
Heavy Equipment and Farm/Garden Connector Sales by Region 2020F versus 2025F
Heavy Equipment and Farm/Garden by Product Type 2018, 2019, and 2020F with Percent Change
Heavy Equipment and Farm/Garden by Product Type 2019, 2020F, and 2025F with Percent Change and Five-Year CAGR
Recreation Vehicles and Power Sports
Recreation Vehicles and Power Sports by Region 2018, 2019, and 2020F with Percent Change
Recreation Vehicles and Power Sports by Region 2019, 2020F, and 2025F with Percent Change and Five-Year CAGR
Recreation Vehicles and Power Sports by Region 2020F versus 2025F
Recreation Vehicles and Power Sports by Product Type 2018, 2019, and 2020F with Percent Change
Recreation Vehicles and Power Sports by Product Type 2019, 2020F, and 2025F with

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Percent Change and Five-Year CAGR

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About

Market values and forecasts covering the period 2013 through 2018F are provided along with 5-Year CAGR figures by region of the world, segment and sub-segment.

The Non-Automotive Transportation Industry can be characterized as a group of highly mature segments bonded via the application of the internal combustion engine.

As represented by the continuum below, to completely understand the overall industry, one must assess the value of each segment relative to connector consumption or sophistication of application to the annual production levels.

The most sophisticated or complex applications such as those in commercial aviation are impacted by the relatively low volume of the number of units produced annually. On the other hand, high volume production vehicles that reside within the recreation sector are the least complex and in some very basic models do not even use what is classified in this report as an 'electronic connector'.

Government intervention is one of the most significant factors impacting this industry. Most governments, especially those in Europe, Japan, and North America have set standards for clean air which impact every vehicle producing emissions into the atmosphere. To meet these standards, engine technology will change, driving early replacement of vehicles with non-conforming or older technology engines.

The rail sector also looks toward government support as expansion is extremely capital intensive when it comes to building the infrastructure for high speed rail lines and other passenger services.

The adoption of technologies in common with the automotive sector, such as splashproof/waterproof connectors, electronic control modules, and CANbus, provide the basis for significant connector consumption within the Non-Automotive market as well.

In addition, each industry segment currently possesses a critical mass with respect to these core technologies along with dynamic programs such as: In-Flight Entertainment, Intelligent Transport, Telematics, Precision Farming, and PTC/ERMTS Rail Control which will significantly contribute to overall market growth to nearly $4 Billion at a compound annual rate of 6.4% through 2018.

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