

Global Aerospace & Defense Core Materials Market Size Study & Forecast, by Type (Foam, Balsa, Honeycomb) by Application (Airframe, Aerostructures, Research & Development, MRO), By Material (Aluminium, Titanium, Composites, Superalloys, Steel, Plastic, Others), By Aircraft Parts (Aerostructure, Components, Cabin Interiors, Propulsion System, Equipment, System, & Support, Satellites, Construction & Insulation Components) and Regional Forecasts 2025-2035

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Abstracts

The Global Aerospace & Defense Core Materials Market is valued at approximately USD 0.41 billion in 2025 and is poised to expand at a robust CAGR of 13.30% over the forecast period from 2025 to 2035, with historical data firmly grounded in 2023 and 2025 designated as the base year for estimation. Core materials, including foam, balsa, and honeycomb structures, are engineered to be sandwiched between composite skins to deliver exceptional strength-to-weight ratios, structural rigidity, and fatigue resistance. These materials are increasingly being designed into next-generation aircraft and defense platforms as manufacturers strive to balance lightweight performance with uncompromising safety and durability standards.

Market growth is being propelled by the accelerating pace of aircraft production, rising defense modernization programs, and the industry-wide shift toward advanced composite structures. As airframe and aerostructure manufacturers gear up to meet rising demand for fuel-efficient commercial aircraft and high-performance military

platforms, core materials are being leaned on to reduce overall system weight while scaling up mechanical performance. At the same time, sustained investments in research and development, coupled with advancements in resin compatibility and automated manufacturing techniques, are being carried forward to unlock new application avenues and improve lifecycle performance.

The detailed segments and sub-segments included in the report are:

By Type:

Foam

Balsa

Honeycomb

By Application:

Airframe Manufacturers

Aerostructures Manufacturers

Research & Development

Maintenance, Repair, and Overhaul (MRO)

By Material:

Aluminium

Titanium

Composites

Superalloys

Steel

Plastic

Others

By Aircraft Parts:

Aerostructure

Components

Cabin Interiors

Propulsion System

Equipment, System, & Support

Satellites

Construction & Insulation Components

By Region:

North America

U.S.

Canada

Europe

UK

Germany

France

Spain

Italy

Rest of Europe

Asia Pacific

China

India

Japan

Australia

South Korea

Rest of Asia Pacific

Latin America

Brazil

Mexico

Middle East & Africa

UAE

Saudi Arabia

South Africa

Rest of Middle East & Africa

Among the various material categories, honeycomb core materials are expected to dominate the market over the forecast period. Their widespread adoption is being driven by superior load-bearing capabilities, excellent stiffness-to-weight ratios, and proven performance in both commercial and military aircraft structures. Honeycomb cores are increasingly being written into airframe and aerostructure designs, particularly where weight reduction directly translates into fuel efficiency gains and extended operational range.

From a revenue contribution standpoint, airframe manufacturers currently account for the largest share of the Global Aerospace & Defense Core Materials Market. This leadership position is reinforced by the steady production ramp-up of narrow-body and wide-body aircraft programs, alongside growing procurement of advanced military aircraft. While MRO and research & development applications are gradually scaling up as fleets age and materials innovation intensifies, original airframe manufacturing continues to anchor market revenues due to high-volume material consumption and long-term supply contracts.

The regional dynamics of the market reveal North America as the dominant hub, supported by a strong aerospace manufacturing ecosystem, sustained defense spending, and the presence of major OEMs and tier-one suppliers. Europe follows closely, driven by advanced composite adoption and collaborative aerospace programs. Asia Pacific is emerging as the fastest-growing region, as rising air passenger traffic, expanding domestic aircraft manufacturing capabilities, and increasing defense budgets in countries such as China and India continue to push demand forward. Meanwhile, the Middle East & Africa and Latin America are gradually gaining traction as fleet expansion and MRO activities intensify.

Major market players included in this report are:

Hexcel Corporation

Gurit Holding AG

3A Composites

Euro-Composites S.A.

The Gill Corporation

Sch?tzt GmbH & Co. KGaA

Diab Group

Sabic

Evonik Industries AG

Plascore, Inc.

Argosy International Inc.

Toray Industries, Inc.

CoreLite, Inc.

JAMCO Corporation

General Plastics Manufacturing Company

Global Aerospace & Defense Core Materials Market Report Scope:

Historical Data – 2023, 2025

Base Year for Estimation – 2025

Forecast period – 2025–2035

Report Coverage – Revenue forecast, Company Ranking, Competitive Landscape, Growth factors, and Trends

Regional Scope – North America; Europe; Asia Pacific; Latin America; Middle East & Africa

Customization Scope – Free report customization (equivalent to up to 8 analysts' working hours) with purchase. Addition or alteration to country,

regional & segment scope*

The objective of the study is to define market sizes of different segments and countries in recent years and to forecast their values for the coming years. The report is structured to blend qualitative insight with quantitative rigor, spotlighting critical growth drivers, technical challenges, and evolving application trends that will shape future demand. It also maps investment opportunities across micro-markets and delivers a detailed assessment of the competitive landscape and product strategies adopted by leading industry participants.

Key Takeaways:

Market estimates and forecasts for 10 years from 2025 to 2035.

Annualized revenue analysis with detailed regional and segment-level insights.

In-depth geographical assessment supported by country-level analysis.

Comprehensive competitive landscape profiling key market players.

Strategic evaluation of business initiatives and future market approaches.

Analysis of the competitive structure shaping industry dynamics.

Integrated demand-side and supply-side analysis to support informed decision-making.

Contents

CHAPTER 1. GLOBAL AEROSPACE & DEFENSE CORE MATERIALS MARKET REPORT SCOPE & METHODOLOGY

- 1.1. Research Objective
- 1.2. Research Methodology
 - 1.2.1. Forecast Model
 - 1.2.2. Desk Research
 - 1.2.3. Top Down and Bottom-Up Approach
- 1.3. Research Attributes
- 1.4. Scope of the Study
 - 1.4.1. Market Definition
 - 1.4.2. Market Segmentation
- 1.5. Research Assumption
 - 1.5.1. Inclusion & Exclusion
 - 1.5.2. Limitations
 - 1.5.3. Years Considered for the Study

CHAPTER 2. EXECUTIVE SUMMARY

- 2.1. CEO/CXO Standpoint
- 2.2. Strategic Insights
- 2.3. ESG Analysis
- 2.4. key Findings

CHAPTER 3. GLOBAL AEROSPACE & DEFENSE CORE MATERIALS MARKET FORCES ANALYSIS

- 3.1. Market Forces Shaping The Global Aerospace & Defense Core Materials Market (2025-2035)
- 3.2. Drivers
 - 3.2.1. accelerating pace of aircraft production
 - 3.2.2. rising defense modernization programs
- 3.3. Restraints
 - 3.3.1. High Procurement Costs
- 3.4. Opportunities
 - 3.4.1. industry-wide shift toward advanced composite structures

CHAPTER 4. GLOBAL AEROSPACE & DEFENSE CORE MATERIALS INDUSTRY ANALYSIS

- 4.1. Porter's 5 Forces Model
 - 4.1.1. Bargaining Power of Buyer
 - 4.1.2. Bargaining Power of Supplier
 - 4.1.3. Threat of New Entrants
 - 4.1.4. Threat of Substitutes
 - 4.1.5. Competitive Rivalry
- 4.2. Porter's 5 Force Forecast Model (2025-2035)
- 4.3. PESTEL Analysis
 - 4.3.1. Political
 - 4.3.2. Economical
 - 4.3.3. Social
 - 4.3.4. Technological
 - 4.3.5. Environmental
 - 4.3.6. Legal
- 4.4. Top Investment Opportunities
- 4.5. Top Winning Strategies (2025)
- 4.6. Market Share Analysis (2025-2025)
- 4.7. Global Pricing Analysis And Trends 2025
- 4.8. Analyst Recommendation & Conclusion

CHAPTER 5. GLOBAL AEROSPACE & DEFENSE CORE MATERIALS MARKET SIZE & FORECASTS BY TYPE 2025-2035

- 5.1. Market Overview
- 5.2. Global Aerospace & Defense Core Materials Market Performance - Potential Analysis (2025)
- 5.3. Foam
 - 5.3.1. Top Countries Breakdown Estimates & Forecasts, 2025-2035
 - 5.3.2. Market size analysis, by region, 2025-2035
- 5.4. Balsa
 - 5.4.1. Top Countries Breakdown Estimates & Forecasts, 2025-2035
 - 5.4.2. Market size analysis, by region, 2025-2035
- 5.5. Honeycomb
 - 5.5.1. Top Countries Breakdown Estimates & Forecasts, 2025-2035
 - 5.5.2. Market size analysis, by region, 2025-2035

CHAPTER 6. GLOBAL AEROSPACE & DEFENSE CORE MATERIALS MARKET SIZE & FORECASTS BY APPLICATION 2025-2035

- 6.1. Market Overview
- 6.2. Global Aerospace & Defense Core Materials Market Performance - Potential Analysis (2025)
- 6.3. Airframe Manufacturers
 - 6.3.1. Top Countries Breakdown Estimates & Forecasts, 2025-2035
 - 6.3.2. Market size analysis, by region, 2025-2035
- 6.4. Aerostructures Manufacturers
 - 6.4.1. Top Countries Breakdown Estimates & Forecasts, 2025-2035
 - 6.4.2. Market size analysis, by region, 2025-2035
- 6.5. Research & Development
 - 6.5.1. Top Countries Breakdown Estimates & Forecasts, 2025-2035
 - 6.5.2. Market size analysis, by region, 2025-2035
- 6.6. Maintenance, Repair, and Overhaul (MRO)
 - 6.6.1. Top Countries Breakdown Estimates & Forecasts, 2025-2035
 - 6.6.2. Market size analysis, by region, 2025-2035

CHAPTER 7. GLOBAL AEROSPACE & DEFENSE CORE MATERIALS MARKET SIZE & FORECASTS BY MATERIAL 2025-2035

- 7.1. Market Overview
- 7.2. Global Aerospace & Defense Core Materials Market Performance - Potential Analysis (2025)
- 7.3. Aluminium
 - 7.3.1. Top Countries Breakdown Estimates & Forecasts, 2025-2035
 - 7.3.2. Market size analysis, by region, 2025-2035
- 7.4. Titanium
 - 7.4.1. Top Countries Breakdown Estimates & Forecasts, 2025-2035
 - 7.4.2. Market size analysis, by region, 2025-2035
- 7.5. Composites
 - 7.5.1. Top Countries Breakdown Estimates & Forecasts, 2025-2035
 - 7.5.2. Market size analysis, by region, 2025-2035
- 7.6. Superalloys
 - 7.6.1. Top Countries Breakdown Estimates & Forecasts, 2025-2035
 - 7.6.2. Market size analysis, by region, 2025-2035
- 7.7. Steel
 - 7.7.1. Top Countries Breakdown Estimates & Forecasts, 2025-2035

- 7.7.2. Market size analysis, by region, 2025-2035
- 7.8. Plastic
 - 7.8.1. Top Countries Breakdown Estimates & Forecasts, 2025-2035
 - 7.8.2. Market size analysis, by region, 2025-2035
- 7.9. Others
 - 7.9.1. Top Countries Breakdown Estimates & Forecasts, 2025-2035
 - 7.9.2. Market size analysis, by region, 2025-2035

CHAPTER 8. GLOBAL AEROSPACE & DEFENSE CORE MATERIALS MARKET SIZE & FORECASTS BY AIRCRAFT PARTS 2025-2035

- 8.1. Market Overview
- 8.2. Global Aerospace & Defense Core Materials Market Performance - Potential Analysis (2025)
- 8.3. Aerostructure
 - 8.3.1. Top Countries Breakdown Estimates & Forecasts, 2025-2035
 - 8.3.2. Market size analysis, by region, 2025-2035
- 8.4. Components
 - 8.4.1. Top Countries Breakdown Estimates & Forecasts, 2025-2035
 - 8.4.2. Market size analysis, by region, 2025-2035
- 8.5. Cabin Interiors
 - 8.5.1. Top Countries Breakdown Estimates & Forecasts, 2025-2035
 - 8.5.2. Market size analysis, by region, 2025-2035
- 8.6. Propulsion System
 - 8.6.1. Top Countries Breakdown Estimates & Forecasts, 2025-2035
 - 8.6.2. Market size analysis, by region, 2025-2035
- 8.7. Equipment, System, & Support
 - 8.7.1. Top Countries Breakdown Estimates & Forecasts, 2025-2035
 - 8.7.2. Market size analysis, by region, 2025-2035
- 8.8. Satellites
 - 8.8.1. Top Countries Breakdown Estimates & Forecasts, 2025-2035
 - 8.8.2. Market size analysis, by region, 2025-2035
- 8.9. Construction & Insulation Components
 - 8.9.1. Top Countries Breakdown Estimates & Forecasts, 2025-2035
 - 8.9.2. Market size analysis, by region, 2025-2035

CHAPTER 9. GLOBAL AEROSPACE & DEFENSE CORE MATERIALS MARKET SIZE & FORECASTS BY REGION 2025–2035

- 9.1. Growth Aerospace & Defense Core Materials Market, Regional Market Snapshot
- 9.2. Top Leading & Emerging Countries
- 9.3. North America Aerospace & Defense Core Materials Market
 - 9.3.1. U.S. Aerospace & Defense Core Materials Market
 - 9.3.1.1. Type breakdown size & forecasts, 2025-2035
 - 9.3.1.2. Application breakdown size & forecasts, 2025-2035
 - 9.3.1.3. Material breakdown size & forecasts, 2025-2035
 - 9.3.1.4. Aircraft Parts breakdown size & forecasts, 2025-2035
 - 9.3.2. Canada Aerospace & Defense Core Materials Market
 - 9.3.2.1. Type breakdown size & forecasts, 2025-2035
 - 9.3.2.2. Application breakdown size & forecasts, 2025-2035
 - 9.3.2.3. Material breakdown size & forecasts, 2025-2035
 - 9.3.2.4. Aircraft Parts breakdown size & forecasts, 2025-2035
- 9.4. Europe Aerospace & Defense Core Materials Market
 - 9.4.1. UK Aerospace & Defense Core Materials Market
 - 9.4.1.1. Type breakdown size & forecasts, 2025-2035
 - 9.4.1.2. Application breakdown size & forecasts, 2025-2035
 - 9.4.1.3. Material breakdown size & forecasts, 2025-2035
 - 9.4.1.4. Aircraft Parts breakdown size & forecasts, 2025-2035
 - 9.4.2. Germany Aerospace & Defense Core Materials Market
 - 9.4.2.1. Type breakdown size & forecasts, 2025-2035
 - 9.4.2.2. Application breakdown size & forecasts, 2025-2035
 - 9.4.2.3. Material breakdown size & forecasts, 2025-2035
 - 9.4.2.4. Aircraft Parts breakdown size & forecasts, 2025-2035
 - 9.4.3. France Aerospace & Defense Core Materials Market
 - 9.4.3.1. Type breakdown size & forecasts, 2025-2035
 - 9.4.3.2. Application breakdown size & forecasts, 2025-2035
 - 9.4.3.3. Material breakdown size & forecasts, 2025-2035
 - 9.4.3.4. Aircraft Parts breakdown size & forecasts, 2025-2035
 - 9.4.4. Spain Aerospace & Defense Core Materials Market
 - 9.4.4.1. Type breakdown size & forecasts, 2025-2035
 - 9.4.4.2. Application breakdown size & forecasts, 2025-2035
 - 9.4.4.3. Material breakdown size & forecasts, 2025-2035
 - 9.4.4.4. Aircraft Parts breakdown size & forecasts, 2025-2035
 - 9.4.5. Italy Aerospace & Defense Core Materials Market
 - 9.4.5.1. Type breakdown size & forecasts, 2025-2035
 - 9.4.5.2. Application breakdown size & forecasts, 2025-2035
 - 9.4.5.3. Material breakdown size & forecasts, 2025-2035
 - 9.4.5.4. Aircraft Parts breakdown size & forecasts, 2025-2035

- 9.4.6. Rest of Europe Aerospace & Defense Core Materials Market
 - 9.4.6.1. Type breakdown size & forecasts, 2025-2035
 - 9.4.6.2. Application breakdown size & forecasts, 2025-2035
 - 9.4.6.3. Material breakdown size & forecasts, 2025-2035
 - 9.4.6.4. Aircraft Parts breakdown size & forecasts, 2025-2035
- 9.5. Asia Pacific Aerospace & Defense Core Materials Market
 - 9.5.1. China Aerospace & Defense Core Materials Market
 - 9.5.1.1. Type breakdown size & forecasts, 2025-2035
 - 9.5.1.2. Application breakdown size & forecasts, 2025-2035
 - 9.5.1.3. Material breakdown size & forecasts, 2025-2035
 - 9.5.1.4. Aircraft Parts breakdown size & forecasts, 2025-2035
 - 9.5.2. India Aerospace & Defense Core Materials Market
 - 9.5.2.1. Type breakdown size & forecasts, 2025-2035
 - 9.5.2.2. Application breakdown size & forecasts, 2025-2035
 - 9.5.2.3. Material breakdown size & forecasts, 2025-2035
 - 9.5.2.4. Aircraft Parts breakdown size & forecasts, 2025-2035
 - 9.5.3. Japan Aerospace & Defense Core Materials Market
 - 9.5.3.1. Type breakdown size & forecasts, 2025-2035
 - 9.5.3.2. Application breakdown size & forecasts, 2025-2035
 - 9.5.3.3. Material breakdown size & forecasts, 2025-2035
 - 9.5.3.4. Aircraft Parts breakdown size & forecasts, 2025-2035
 - 9.5.4. Australia Aerospace & Defense Core Materials Market
 - 9.5.4.1. Type breakdown size & forecasts, 2025-2035
 - 9.5.4.2. Application breakdown size & forecasts, 2025-2035
 - 9.5.4.3. Material breakdown size & forecasts, 2025-2035
 - 9.5.4.4. Aircraft Parts breakdown size & forecasts, 2025-2035
 - 9.5.5. South Korea Aerospace & Defense Core Materials Market
 - 9.5.5.1. Type breakdown size & forecasts, 2025-2035
 - 9.5.5.2. Application breakdown size & forecasts, 2025-2035
 - 9.5.5.3. Material breakdown size & forecasts, 2025-2035
 - 9.5.5.4. Aircraft Parts breakdown size & forecasts, 2025-2035
 - 9.5.6. Rest of APAC Aerospace & Defense Core Materials Market
 - 9.5.6.1. Type breakdown size & forecasts, 2025-2035
 - 9.5.6.2. Application breakdown size & forecasts, 2025-2035
 - 9.5.6.3. Material breakdown size & forecasts, 2025-2035
 - 9.5.6.4. Aircraft Parts breakdown size & forecasts, 2025-2035
 - 9.6. Latin America Aerospace & Defense Core Materials Market
 - 9.6.1. Brazil Aerospace & Defense Core Materials Market
 - 9.6.1.1. Type breakdown size & forecasts, 2025-2035

- 9.6.1.2. Application breakdown size & forecasts, 2025-2035
- 9.6.1.3. Material breakdown size & forecasts, 2025-2035
- 9.6.1.4. Aircraft Parts breakdown size & forecasts, 2025-2035
- 9.6.2. Mexico Aerospace & Defense Core Materials Market
 - 9.6.2.1. Type breakdown size & forecasts, 2025-2035
 - 9.6.2.2. Application breakdown size & forecasts, 2025-2035
 - 9.6.2.3. Material breakdown size & forecasts, 2025-2035
 - 9.6.2.4. Aircraft Parts breakdown size & forecasts, 2025-2035
- 9.7. Middle East and Africa Aerospace & Defense Core Materials Market
 - 9.7.1. UAE Aerospace & Defense Core Materials Market
 - 9.7.1.1. Type breakdown size & forecasts, 2025-2035
 - 9.7.1.2. Application breakdown size & forecasts, 2025-2035
 - 9.7.1.3. Material breakdown size & forecasts, 2025-2035
 - 9.7.1.4. Aircraft Parts breakdown size & forecasts, 2025-2035
 - 9.7.2. Saudi Arabia (KSA) Aerospace & Defense Core Materials Market
 - 9.7.2.1. Type breakdown size & forecasts, 2025-2035
 - 9.7.2.2. Application breakdown size & forecasts, 2025-2035
 - 9.7.2.3. Material breakdown size & forecasts, 2025-2035
 - 9.7.2.4. Aircraft Parts breakdown size & forecasts, 2025-2035
 - 9.7.3. South Africa Aerospace & Defense Core Materials Market
 - 9.7.3.1. Type breakdown size & forecasts, 2025-2035
 - 9.7.3.2. Application breakdown size & forecasts, 2025-2035
 - 9.7.3.3. Material breakdown size & forecasts, 2025-2035
 - 9.7.3.4. Aircraft Parts breakdown size & forecasts, 2025-2035

CHAPTER 10. COMPETITIVE INTELLIGENCE

- 10.1. Top Market Strategies
- 10.2. Hexcel Corporation
 - 10.2.1. Company Overview
 - 10.2.2. Key Executives
 - 10.2.3. Company Snapshot
 - 10.2.4. Financial Performance (Subject to Data Availability)
 - 10.2.5. Product/Services Port
 - 10.2.6. Recent Development
 - 10.2.7. Market Strategies
 - 10.2.8. SWOT Analysis
- 10.3. Gurit Holding AG
- 10.4. 3A Composites

- 10.5. Euro-Composites S.A.
- 10.6. The Gill Corporation
- 10.7. Sch?tz GmbH & Co. KGaA
- 10.8. Diab Group
- 10.9. Sabic
- 10.10. Evonik Industries AG
- 10.11. Plascore, Inc.
- 10.12. Argosy International Inc.
- 10.13. Toray Industries, Inc.
- 10.14. CoreLite, Inc.
- 10.15. JAMCO Corporation
- 10.16. General Plastics Manufacturing Company

List Of Tables

LIST OF TABLES

- Table 1. Global Aerospace & Defense Core Materials Market, Report Scope
- Table 2. Global Aerospace & Defense Core Materials Market Estimates & Forecasts By Region 2025–2035
- Table 3. Global Aerospace & Defense Core Materials Market Estimates & Forecasts By Segment 2025–2035
- Table 4. Global Aerospace & Defense Core Materials Market Estimates & Forecasts By Segment 2025–2035
- Table 5. Global Aerospace & Defense Core Materials Market Estimates & Forecasts By Segment 2025–2035
- Table 6. Global Aerospace & Defense Core Materials Market Estimates & Forecasts By Segment 2025–2035
- Table 7. Global Aerospace & Defense Core Materials Market Estimates & Forecasts By Segment 2025–2035
- Table 8. U.S. Aerospace & Defense Core Materials Market Estimates & Forecasts, 2025–2035
- Table 9. Canada Aerospace & Defense Core Materials Market Estimates & Forecasts, 2025–2035
- Table 10. UK Aerospace & Defense Core Materials Market Estimates & Forecasts, 2025–2035
- Table 11. Germany Aerospace & Defense Core Materials Market Estimates & Forecasts, 2025–2035
- Table 12. France Aerospace & Defense Core Materials Market Estimates & Forecasts, 2025–2035
- Table 13. Spain Aerospace & Defense Core Materials Market Estimates & Forecasts, 2025–2035
- Table 14. Italy Aerospace & Defense Core Materials Market Estimates & Forecasts, 2025–2035
- Table 15. Rest Of Europe Aerospace & Defense Core Materials Market Estimates & Forecasts, 2025–2035
- Table 16. China Aerospace & Defense Core Materials Market Estimates & Forecasts, 2025–2035
- Table 17. India Aerospace & Defense Core Materials Market Estimates & Forecasts, 2025–2035
- Table 18. Japan Aerospace & Defense Core Materials Market Estimates & Forecasts, 2025–2035

Table 19. Australia Aerospace & Defense Core Materials Market Estimates & Forecasts, 2025–2035

Table 20. South Korea Aerospace & Defense Core Materials Market Estimates & Forecasts, 2025–2035

.....

List Of Figures

LIST OF FIGURES

Fig 1. Global Aerospace & Defense Core Materials Market, Research Methodology

Fig 2. Global Aerospace & Defense Core Materials Market, Market Estimation Techniques

Fig 3. Global Market Size Estimates & Forecast Methods

Fig 4. Global Aerospace & Defense Core Materials Market, Key Trends 2025

Fig 5. Global Aerospace & Defense Core Materials Market, Growth Prospects 2025–2035

Fig 6. Global Aerospace & Defense Core Materials Market, Porter’s Five Forces Model

Fig 7. Global Aerospace & Defense Core Materials Market, Pestel Analysis

Fig 8. Global Aerospace & Defense Core Materials Market, Value Chain Analysis

Fig 9. Aerospace & Defense Core Materials Market By Application, 2025 & 2035

Fig 10. Aerospace & Defense Core Materials Market By Segment, 2025 & 2035

Fig 11. Aerospace & Defense Core Materials Market By Segment, 2025 & 2035

Fig 12. Aerospace & Defense Core Materials Market By Segment, 2025 & 2035

Fig 13. Aerospace & Defense Core Materials Market By Segment, 2025 & 2035

Fig 14. North America Aerospace & Defense Core Materials Market, 2025 & 2035

Fig 15. Europe Aerospace & Defense Core Materials Market, 2025 & 2035

Fig 16. Asia Pacific Aerospace & Defense Core Materials Market, 2025 & 2035

Fig 17. Latin America Aerospace & Defense Core Materials Market, 2025 & 2035

Fig 18. Middle East & Africa Aerospace & Defense Core Materials Market, 2025 & 2035

Fig 19. Global Aerospace & Defense Core Materials Market, Company Market Share Analysis (2025)

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