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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 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

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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

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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

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- 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

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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.

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The Gill Corporation

Sch?tz 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,

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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.

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CHAPTER 10. COMPETITIVE INTELLIGENCE

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