

Global Aircraft Composite Structural Components Supply, Demand and Key Producers, 2026-2032

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Abstracts

The global Aircraft Composite Structural Components market size is expected to reach \$ 26354 million by 2032, rising at a market growth of 6.1% CAGR during the forecast period (2026-2032).

Aircraft composite structural components refer to aircraft-installed structural or functional parts manufactured from carbon fibre, glass fibre, aramid fibre and other reinforcement systems combined with thermoset or thermoplastic resin matrices such as epoxy, bismaleimide, phenolic, PEEK, PEKK and PPS. These components are produced through aerospace-qualified processes including prepreg lay-up, automated fibre placement, automated tape laying, autoclave curing, resin transfer moulding, vacuum-assisted processing, thermoplastic forming and welding, bonded sandwich construction, secondary assembly and non-destructive inspection.

This research scope focuses on composite parts installed on aircraft, helicopters, UAVs, eVTOL aircraft and other aviation platforms, including wing structures, fuselage sections, empennage parts, flight control surfaces, doors, fairings, nacelle and thrust reverser structures, radomes, composite ducting, structural cabin sandwich panels, rotor blades and UAV composite airframes. The core value proposition of these products lies in weight reduction, fatigue resistance, corrosion avoidance, aerodynamic performance, parts consolidation and lifecycle efficiency.

Indicative pricing varies significantly by certification level, size and structural criticality: small covers, fairings, ducts and interior sandwich panels may range from hundreds to tens of thousands of US dollars per unit; medium-sized control surfaces, doors, radomes and nacelle composite assemblies may range from tens of thousands to several hundred thousand US dollars; while large wing boxes, fuselage sections,

empennage structures or shipset-level composite assemblies can reach several hundred thousand to several million US dollars.

Based on our research, aircraft composite structural components should not be treated as a generic carbon-fibre parts market. The industry is better understood as a certified aerospace manufacturing segment built around aircraft weight reduction, structural integrity, platform qualification and long-cycle OEM supply relationships. The core research boundary should therefore be aircraft-installed composite structures and functional composite parts, rather than upstream fibres, prepregs, resins or composite manufacturing equipment. The engineering role of composites has already been validated by modern widebody platforms, where carbon-fibre structures are used extensively in fuselage sections, wings, empennage and flight control surfaces. This has moved the industry from an 'advanced material application' phase into a mainstream aircraft architecture phase. As a result, the sector combines the stability of a mature aerospace supply chain with structural growth drivers from new aircraft programmes, production-rate recovery, defence UAVs, eVTOL platforms and process innovation in thermoplastic composites.

From a supply-side perspective, the global industry remains concentrated in North America, Europe, Japan and a limited number of Asian and Middle Eastern manufacturing clusters. The first tier consists of OEM-related and Tier 1 aerostructure groups such as Boeing/Spirit, Airbus internal aerostructure operations, RTX/Collins, Safran, GKN, FACC, Leonardo, Mitsubishi Heavy Industries, Kawasaki Heavy Industries and Subaru. These companies are embedded in major aircraft programmes, have long certification histories and benefit from high switching costs. A second tier is formed by platform specialists and regional manufacturers such as Aernnova, Sonaca/Aciturri, Daher, Latécoère, Albany Engineered Composites, Qarbon Aerospace, Kaman, CTRM, Strata, Turkish Aerospace, IAI, AIDC, KAI and a growing group of Chinese suppliers including AVIC-related entities, Jialiqi, ATCC and Guanglian Aviation. The difference between the broad supplier universe and the core formal list is driven mainly by evidence quality, revenue transparency and mixed business models, rather than by a lack of product relevance.

Demand is supported by three principal sources: commercial aircraft production and fleet renewal, military aircraft and UAV platform upgrades, and recurring demand for nacelles, radomes, ducts, doors, fairings and other specialist composite parts. Airbus and Boeing delivery and backlog disclosures indicate that the underlying commercial aerospace demand base remains substantial, although production recovery continues to be constrained by engines, labour, supplier capacity and certification timing. In this

market, entry barriers are not limited to material capability. They also include design validation, process repeatability, non-destructive inspection, batch consistency, OEM qualification and programme-specific approval. For that reason, the medium-term market is unlikely to be disrupted by a large number of low-barrier entrants. Incremental capacity is more likely to come from existing Tier 1 suppliers, regional aerospace industrial groups and certified specialist composite manufacturers.

In terms of technology evolution, thermoset carbon-fibre composites remain the mainstream solution for high-performance aircraft structures, and prepreg-autoclave processing continues to be widely used for safety-critical components. At the same time, thermoplastic composites, automated fibre placement, automated tape laying, co-curing, co-bonding, optimized sandwich structures and lower-cost automation are becoming increasingly important competitive themes. Thermoplastic composites offer potential advantages in cycle time, weldability, recyclability and long-term production efficiency, but wider use in primary aircraft structures will still require qualification, design confidence and supply-chain maturity. The future of the industry is therefore unlikely to be a simple 'composites replacing metals' story. It will be shaped by the optimal combination of material systems, structural criticality, production rates, certification requirements and total lifecycle economics.

This report studies the global Aircraft Composite Structural Components demand, key companies, and key regions.

This report is a detailed and comprehensive analysis of the world market for Aircraft Composite Structural Components, and provides market size (US\$ million) and Year-over-Year (YoY) growth, considering 2025 as the base year. This report explores demand trends and competition, as well as details the characteristics of Aircraft Composite Structural Components that contribute to its increasing demand across many markets.

Highlights and key features of the study

Global Aircraft Composite Structural Components total market, 2021-2032, (USD Million)

Global Aircraft Composite Structural Components total market by region & country, CAGR, 2021-2032, (USD Million)

U.S. VS China: Aircraft Composite Structural Components total market, key domestic companies, and share, (USD Million)

Global Aircraft Composite Structural Components revenue by player, revenue and market share 2021-2026, (USD Million)

Global Aircraft Composite Structural Components total market by Structural Location, CAGR, 2021-2032, (USD Million)

Global Aircraft Composite Structural Components total market by Application, CAGR, 2021-2032, (USD Million)

This report profiles major players in the global Aircraft Composite Structural Components market based on the following parameters - company overview, revenue, gross margin, product portfolio, geographical presence, and key developments. Key companies covered as a part of this study include Boeing, Airbus SE, incl. Airbus Atlantic, RTX Corporation, Safran SA, GKN Aerospace, FACC AG, Leonardo S.p.A., Mitsubishi Heavy Industries, Aernnova Aerospace, Sonaca Group, etc.

This report also provides key insights about market drivers, restraints, opportunities, new product launches or approvals.

Stakeholders would have ease in decision-making through various strategy matrices used in analyzing the world Aircraft Composite Structural Components market

Detailed Segmentation:

Each section contains quantitative market data including market by value (US\$ Millions), by player, by regions, by Structural Location, and by Application. Data is given for the years 2021-2032 by year with 2025 as the base year, 2026 as the estimate year, and 2027-2032 as the forecast year.

Global Aircraft Composite Structural Components Market, By Region:

United States

China

Europe

Japan

South Korea

ASEAN

India

Rest of World

Global Aircraft Composite Structural Components Market, Segmentation by Structural Location:

Fuselage Structures

Wing Structures

Empennage and Control Surfaces

Nacelles, Fairings and Doors

Other

Global Aircraft Composite Structural Components Market, Segmentation by Manufacturing Process:

Prepreg-autoclave Processing

Resin Infusion / RTM / OOA Processing

Thermoplastic Composite Forming and Welding

Sandwich and Bonded Assembly

Other

Global Aircraft Composite Structural Components Market, Segmentation by Certification and Structural Criticality:

Flight-critical Composite Structures

Primary Load-bearing Composite Structures

Secondary / Semi-structural Composite Components

Other

Global Aircraft Composite Structural Components Market, Segmentation by Application:

Fixed-wing aircraft

Helicopter

Multirotor

Glider

Other

Companies Profiled:

Boeing

Airbus SE, incl. Airbus Atlantic

RTX Corporation

Safran SA

GKN Aerospace

FACC AG

Leonardo S.p.A.

Mitsubishi Heavy Industries

Aernnova Aerospace

Sonaca Group

Daher

Kawasaki Heavy Industries

Subaru Corporation

Albany Engineered Composites

Qarbon Aerospace

AVICOPTER PLC

AVIC High-Technology

Guanglian Aviation Industry

ATCC Innovation Technology

Anhui Jialiqi

Aerospace Industrial Development Corporation

Korea Aerospace Industries

CTRM

Strata Manufacturing

Turkish Aerospace Industries

Israel Aerospace Industries

Saab AB

Lat?co?re

Kaman Corporation

Park Aerospace

COTESA GmbH

Senior Aerospace BWT

FDC Aero Composites

General Dynamics Mission Systems

Saint-Gobain Aerospace

SABCA

Bombardier Inc.

Embraer S.A.

Songwol Technologies

Key Questions Answered

1. How big is the global Aircraft Composite Structural Components market?
2. What is the demand of the global Aircraft Composite Structural Components market?
3. What is the year over year growth of the global Aircraft Composite Structural Components market?
4. What is the total value of the global Aircraft Composite Structural Components market?
5. Who are the Major Players in the global Aircraft Composite Structural Components market?
6. What are the growth factors driving the market demand?

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