

# **Aerospace Hose and Tube Assemblies Market by Platform Type (Commercial Aircraft, Military Aircraft, Regional Aircraft, General Aviation, Helicopter, and Others), by Product Type (Hoses and Tubes), by Hose Type (PTFE Hoses, Rubber Hoses, and Others), by Tube Type (Stainless Steel Tubes, Inconel Tubes, Titanium Tubes, and Others), by Pressure Type (Low- & Medium-Pressure, and High-Pressure), by Application Type (Fuel System, Hydraulic System, Instrumentation, and Others), and by Region (North America, Europe, Asia-Pacific, and Rest of The World), Trend, Forecast, Competitive Analysis, and Growth Opportunity: 2019-2024**

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## **Abstracts**

This strategic assessment report, from Stratview Research, provides a comprehensive analysis that reflects today's aerospace hose and tube assemblies market realities and future possibilities for the forecast period of 2019 to 2024. After a continuous interest on our aerospace fluid conveyance market report from the industry stakeholders, we have tried to further narrow down our research scope to hoses and tubes in order to provide the most crystal clear picture of the market, as these products are crucial members of fluid conveyance family. The report segments and analyzes the market in the most detailed and comprehensive manner to provide a panoramic view of the market. The vital data/information provided in the report can play a crucial role for market participant as well as investors in the identification of low-hanging fruits available

as well as formulate growth strategies.

### The Aerospace Hose and Tube Assemblies Market: Highlights

Hose and tube assemblies in the aerospace industry serve the purpose of a conduit through which fluid is conveyed. Tubes are used in stationary application; where long and relatively straight runs are possible. They are widely used in the aerospace industry for fuel, oil, coolant, oxygen, instrument, and hydraulic lines. Similarly, hoses are used to connect moving parts with stationary parts, where they are subject to considerable vibration or where a great amount of flexibility is required. In the aerospace industry, tubes are usually rigid fluid lines made of materials, such as stainless steel, Inconel, titanium, copper, and aluminum. On the other hand, hoses are flexible fluid lines usually made of rubber (EPDM, neoprene, etc.) and Polytetrafluoroethylene (PTFE).

The market for hose and tube assemblies in the aerospace industry will continue to witness promising growth over the next five years to reach an estimated value of US\$ 1.5 billion in 2024. Several factors are directly or indirectly bolstering the demand for hose and tube assemblies in the aerospace industry in which some of the major ones are organic growth of the aircraft industry and increasing demands for lightweight and durable fluid conveyance systems.

Boeing anticipated that there would be total deliveries of 42,730 commercial and regional aircraft worth of US\$ 6.3 trillion in the global marketplace during 2018-2037. Asia-Pacific and Europe would be the biggest demand generators with a combined share of 62.5% of the total aircraft deliveries during 2018-2037. An expected healthy CAGR of 4.7% in air passenger traffic during 2018-2037 will chiefly drive the demand for the aircraft. This factor will create sustainable demand for hose and tube assemblies in the aerospace industry.

Another factor adding flavor to the the market dynamics is the gradual consolidation. Major players are acquiring small players to tap the potential of this highly growing market. Some of the prominent mergers & acquisitions that took place in the market include the acquisition of Polimer Kauçuk Sanayi ve Pazarlama A.S., a Turkish manufacturer of hydraulic and industrial hose, by Eaton Corporation; acquisition of Global Tubes and FMH Aerospace Corporation by Ametek, Inc., and acquisition of Zodiac Aerospace by Safran S.A.

Based on the platform type, the market is segmented into commercial aircraft, military aircraft, regional aircraft, general aviation, helicopter, and others. Commercial aircraft is likely to remain the growth engine of the market during the forecast period. Today, the

deliveries of commercial aircraft are at peak and have not witnessed a decline in the past seven years. Stratview estimates and OEMs' announcements suggest that the production of aircraft will continue to increase as both Boeing and Airbus are enjoying a huge pile of order backlogs and have been increasing the production rates of their key programs (B737, B787, A320, and A350XWB). They are also developing fuel-efficient aircraft platforms (A320neo, B737 Max, B777x, and A330neo) to address the grave concern of airlines. Apart from these above-mentioned factors, market entry of COMAC and Irkut in the commercial aircraft segment further increases the potential of hoses and tubes in the commercial aircraft segment.

Based on the product type, the market is segmented into hoses and tubes. Hoses are further bifurcated based on the material type into PTFE hoses (Teflon), rubber hoses, and others. Similarly, tubes are classified based on the material type into stainless steel tubes, Inconel tubes, titanium tubes, and others. PTFE hoses are expected to maintain its dominance in the aerospace hose assemblies market, whereas titanium tubes are likely to witness the highest growth in aerospace tube assemblies market.

Based on the application type, the market is segmented into fuel system, hydraulic system, instrumentation, and others. Fuel system is estimated to remain the largest and the fastest-growing application segment for hose and tube assemblies in the aerospace industry over the next five years. Hoses and tubes in an aircraft fuel system deliver fuel to the propulsion system and auxiliary power unit. Fuel lines are required to be securely attached to aircraft with the clamp; thus, usually, metal tubes are used for it. In case where flexibility is required, rubber or PTFE hoses are used.

In terms of regions, North America is expected to remain the largest market for aerospace hose and tube assemblies during the forecast period. The USA is the growth engine of the region's market with the presence of major aircraft OEMs, tier players, hose and tube suppliers, and airlines. All the major hose and tube assemblies' suppliers have their presence in the region to address the emergent needs of the OEMs in order to be the partner for their upcoming aircraft programs or upcoming fuel-efficient variants of existing aircraft programs.

Europe is likely to remain the second-largest market for aerospace hose and tube assemblies during the forecast period. Commercial aircraft is the growth engine of the European market for aerospace hose and tube assemblies, largely driven by the A320 and A350 XWB aircraft programs. Airbus has a massive plan to raise the production rate of its A320 family aircraft including neo variants, Airbus reported that the A320 programme is on track to achieve production rate 60 per month for the A320 Family by

mid-2019.

Asia-Pacific is expected to experience the highest growth in the global market during the forecast period. The highest growth of Asia-Pacific is mainly attributable to the increasing aircraft fleet to support rising passenger traffic; opening of assembly plants of Boeing and Airbus for B737, A320, and A330 aircraft programs; increasing procurement of military aircraft, owing to rising defense budget; and upcoming indigenous commercial and regional aircraft (C919 and MRJ).

The supply chain of this market comprises raw material suppliers, aerospace hose and tube manufacturers, tier players, aircraft OEMs, airlines, and aircraft leasing companies. Key players in the market are Eaton Corporation, Parker Hannifin Corporation, Smiths Group plc, PFW Aerospace, Leggett & Platt, Inc., Ametek, Inc., ITT Inc., Unison Industries, Stelia Aerospace, Safran S.A., Flexfab, LLC, and Steico Industries Inc. Development of lightweight hoses and tubes for critical applications, expansion in untapped and growing markets, and execution of mergers & acquisitions are the key strategies adopted by the major players to gain a competitive edge in the market.

### Research Methodology

Our reports offer high-quality insights and are the outcome of detailed research methodology comprising extensive secondary research, rigorous primary interviews with industry stakeholders and validation and triangulation with Stratview Research's internal database and statistical tools. More than 1000 authenticated secondary sources, such as company annual reports, fact book, press release, journals, investor presentation, white papers, patents, and articles, have been leveraged to gather the data. We conducted more than 10 detailed primary interviews with the market players across the value chain in all four regions and industry experts to obtain both qualitative and quantitative insights.

### Report Features

This report provides market intelligence in the most comprehensive way. The report structure has been kept such that it offers maximum business value. It provides critical insights into the market dynamics and will enable strategic decision making for the existing market players as well as those willing to enter the market. The following are the key features of the report:

Market structure: Overview, industry life cycle analysis, supply chain analysis

Market environment analysis: Growth drivers and constraints, Porter's five forces analysis, SWOT analysis

Market trend and forecast analysis

Market segment trend and forecast

Competitive landscape and dynamics: Market share, product portfolio, product launches, etc.

Attractive market segments and associated growth opportunities

Emerging trends

Strategic growth opportunities for the existing and new players

Key success factors

The global aerospace hose and tube assemblies market is segmented into the following categories:

Aerospace Hose and Tube Assemblies Market, By Platform Type:

Commercial Aircraft (Regional Analysis: North America, Europe, Asia-Pacific, and RoW)

Regional Aircraft (Regional Analysis: North America, Europe, Asia-Pacific, and RoW)

General Aviation (Regional Analysis: North America, Europe, Asia-Pacific, and RoW)

Helicopter (Regional Analysis: North America, Europe, Asia-Pacific, and RoW)

Military Aircraft (Regional Analysis: North America, Europe, Asia-Pacific, and RoW)

Others (Regional Analysis: North America, Europe, Asia-Pacific, and RoW)

Aerospace Hose and Tube Assemblies Market, By Type

Aerospace Hoses

Regional Analysis: North America, Europe, Asia-Pacific, and RoW

Material Analysis: Polytetrafluoroethylene (PTFE), Rubber, and Others

Braided Type: Single layer, Two Layer, and Others

Aerospace Tubes

Regional Analysis: North America, Europe, Asia-Pacific, and RoW

Material Analysis: Stainless Steel, Inconel, Titanium, and Others

Aerospace Hose and Tube Assemblies Market, By Pressure Type

Low & Medium Pressure (Regional Analysis: North America, Europe, Asia-Pacific, and RoW)

High Pressure (Regional Analysis: North America, Europe, Asia-Pacific, and RoW)

Aerospace Hose and Tube Assemblies Market, By Application Type

Fuel System (Regional Analysis: North America, Europe, Asia-Pacific, and RoW)

Hydraulic System (Regional Analysis: North America, Europe, Asia-Pacific, and RoW)

Instrumentation (Regional Analysis: North America, Europe, Asia-Pacific, and RoW)

Others (Regional Analysis: North America, Europe, Asia-Pacific, and RoW)

## Aerospace Hose and Tube Assemblies Market, By Region

North America (Country Analysis: The USA, Canada, and Mexico)

Europe (Country Analysis: Germany, France, The UK, Russia, and Rest of Europe)

Asia-Pacific (Country Analysis: China, Japan, India, and Rest of Asia-Pacific)

Rest of the World (Country Analysis: Latin America, Middle East, and Others)

Report Customization Options

With this detailed report, Stratview Research offers one of the following free customization options to our respectable clients:

### Competitive Assessment

Competitive Benchmarking of key players (up to 3 players)

SWOT analysis of key players (up to 3 players)

Regional Segmentation

Current market size (2018) of aerospace hose and tube assemblies in any North American country by product type

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