

Aerospace Pressure Bulkheads Market by Aircraft Type (Narrow-Body Aircraft, Wide-Body Aircraft, Very Large-Body Aircraft, Regional Aircraft, and Business Jet), by Platform Type (B737, B777, B787, B737Max, B777x, A320 Family, A330/A340, A350XWB, A380, A320neo Family, A330neo, E 175, A220, and Others), by Material Type (Metal Pressure Bulkhead and Composite Pressure Bulkhead), by Shape Type (Flat Pressure Bulkhead and Curved Pressure Bulkhead), by Manufacturing Process Type (Sheet Stamping, Resin Infusion Process, and Prepreg Layup), 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 report, from Stratview Research, studies the global aerospace pressure bulkheads market over the trend period from 2013 to 2018 and the forecast period from 2019 to 2024. The report provides detailed insights into the market dynamics to enable informed business decision making and growth strategy formulation based on the opportunities present in the market.

The Global Aerospace Pressure Bulkheads Market: Highlights

Pressure bulkhead of an aircraft is an essential component that covers the front and rear end of a fuselage. It maintains the pressure required for the cabin of an aircraft; hence, it is considered very important for the safety of passengers and crew members. There are typically two pressure bulkheads present in an aircraft, one at the front end of fuselage and other at the rear end. Front pressure bulkhead is located near the nose landing gear and maintains front cabin pressure, whereas rear pressure bulkhead seals the pressurized passenger compartment.

The pressure bulkheads market for the aerospace industry is estimated to grow at an above industry growth rate over the next five years to reach an estimated value of US\$ 505.5 million in 2024. The market is served by aircraft OEMs producing bulkheads in-house for some of their bulkheads as well as independent suppliers/tier players producing bulkheads for different aircraft OEMs. Major aircraft OEMs, such as Airbus and Bombardier, are producing pressure bulkheads, generally front one, for some of their aircraft programs. Also, major tier players including Spirit AeroSystems and RUAG, are also present in the market, primarily producing rear pressure bulkheads. However, tier players also produce front pressure bulkheads.

The market has experienced a remarkable transition over a period of time, especially in terms of design, material, and size among which composite pressure bulkhead is in limelight. Both major commercial aircraft manufacturers: Boeing and Airbus, have played a crucial role in the development of composite pressure bulkheads targeting further improvements in the safety of the aircraft. Composite pressure bulkheads are highly corrosion resistant and offer high strength-to-weight ratio, low maintenance requirement, and contain a reduced number of parts. For instance, Airbus manufactures composite pressure bulkheads for its A380 program using carbon fiber-reinforced plastics and saves up to 40 kg (88 lbs.) than the similar-sized metallic bulkheads. Boeing's B737, B737 Max, B787 and Airbus' A330, A350XWB, A380, A220, and COMAC's C919 are equipped with composite pressure bulkhead.

The excellent growth of the market is driven by a host of factors including the increasing production rates of the best-selling aircraft including B737, A320, B787, A220, and A350XWB, introduction of the fuel-efficient variant of the key aircraft programs including B737Max, B777x, A320neo, A330neo, and E-2 jets, an increased demand for lightweight composite pressure bulkheads, and an advancement in the manufacturing technology.

The market is segmented based on the aircraft type as Narrow-Body Aircraft, Wide-Body Aircraft, Very Large-Body Aircraft, Regional Aircraft, and Business Jet. Narrow-

body aircraft is expected to remain the largest segment of the global aerospace pressure bulkheads market during the forecast period of 2019 to 2024, whereas wide-body aircraft is expected to experience the highest growth during the same period. Increasing commercial aircraft deliveries to support rising passenger and freight traffic, introduction of fuel-efficient next-generation aircraft, and rising commercial aircraft fleet size across regions are the key factors propelling the demand for pressure bulkheads in the segment.

Based on the material type, the is segmented as Metal Pressure Bulkheads and Composite Pressure Bulkheads. Metal pressure bulkhead is projected to remain the most dominant segment of the market over the next five years as well. Metal pressure bulkheads, generally aluminum, have an excellent strength-to-weight ratio and are easy to repair as compared to composite ones. Low cost is another key countable factor for its preference over composite pressure bulkheads.

Composite pressure bulkhead is projected to remain the faster-growing segment during the forecast period. The aerospace industry is demanding lightweight components that can contribute to its goal of achieving higher fuel efficiency and reducing the emissions. This has resulted in an increased demand for composite pressure bulkheads. Rear pressure bulkheads of aircraft are more often made with composites compared to the forward ones. But now, composites are also gaining the traction in the forward location.

Based on the shape type, the market is segmented as Flat-shaped Bulkheads and Curved-Shaped bulkheads. Flat pressure bulkhead is projected to remain the most dominant segment of the market over the next five years. Pressure bulkhead structure is highly dependent upon the structure of an aircraft. Rear pressure bulkheads are generally curved, whereas the front ones are flat; however, Boeing, in its major program B737, has replaced curved pressure bulkhead to flat one in the rear location in order to increase more cabin space and add more seats.

In terms of region, North America is projected to remain the largest market during the forecast period as the region is the manufacturing capital of the aerospace industry with the presence of several large- to small-sized aircraft OEMs and tier players. The USA would remain the growth engine of the North American market. North America is the hub of the major pressure bulkhead manufacturers, such as Triumph Group, Inc., Bombardier Inc., and Spirit AeroSystems GmbH.

Asia-Pacific is projected to witness the highest CAGR over the next five years, propelled by several factors including upcoming commercial and regional aircraft, such as C919

and MRJ, and an opening of assembly plants in China by Boeing and Airbus. China, Japan, and India are expected to remain the growth engines of the Asia-Pacific's market during the forecast period.

The supply chain of this market comprises raw material suppliers, pressure bulkhead manufacturers, distributors, Aircraft OEMs, airline companies, aircraft leasing companies, and MRO companies. The key pressure bulkhead manufacturers are Airbus Group, Bombardier Inc., Spirit AeroSystems GmbH, RUAG Holding AG, Premium AEROTEC GmbH, Kawasaki Heavy Industries, Ltd., and Aernnova Aerospace S.A. Development of lightweight pressure bulkhead, collaboration with OEMs, and formation of long-term contracts are the key strategies adopted by the major players to gain a competitive edge in the market.

Research Methodology

This report offers high-quality insights and is 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 500 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 have conducted 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. 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 pressure bulkheads market is segmented into the following categories:

Aerospace Pressure Bulkheads Market by Aircraft Type:

Narrow-Body Aircraft

Wide-Body Aircraft

Very Large-Body Aircraft

Regional Aircraft

Business Jet

Aerospace Pressure Bulkheads Market by Platform Type:

B737

B777

B787

B737 Max

B777X

A320 Family

A330 / A340

A350 XWB

A380

A320 neo

A330 neo

E 175

A220 (C Series)

Others

Aerospace Pressure Bulkheads Market by Material Type:

Metal Pressure Bulkheads

Composite Pressure Bulkheads

Aerospace Pressure Bulkheads Market by Shape Type:

Flat Pressure Bulkheads

Curved Pressure Bulkheads

Aerospace Pressure Bulkheads Market by Manufacturing Process Type

Sheet Stamping Process

Resin Infusion Process

Prepreg Layup Process

Aerospace Pressure Bulkheads Market by Region

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

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

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

Rest of the World (Sub-Region Analysis: Latin America, the 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:

Company Profiling

Detailed profiling of additional market players (up to three players)

SWOT analysis of key players (up to three players)

Regional Segmentation

Current market segmentation of any one of the regions by material type

Competitive Benchmarking

Benchmarking of key players on the following parameters: Product portfolio, geographical reach, regional presence, and strategic alliances

Contents

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Abbreviation
Currency Exchange
About Us
Report Scope
Report Objectives
Research Methodology
Secondary Research
Key Information Gathered from Secondary Research
Primary Research
Key Information Gathered from Primary Research
Breakdown of Primary Interviews by Region, Designation, and Value Chain Node
Data Analysis and Triangulation

1. EXECUTIVE SUMMARY

2. AEROSPACE PRESSURE BULKHEADS MARKET - OVERVIEW AND MARKET FORCES

2.1. Introduction
2.2. Market Classification
 2.2.1. By Aircraft Type
 2.2.2. By Platform Type
 2.2.3. By Material Type
 2.2.4. By Shape Type
 2.2.5. By Manufacturing Process Type
 2.2.6. By Region
2.3. Market Drivers
2.4. Market Constraints
2.5. Supply Chain Analysis
2.6. Industry Life Cycle Analysis
2.7. PEST Analysis: Impact Assessment of Changing Business Environment
2.8. Porter's Five Forces Analysis
 2.8.1. Bargaining Power of Suppliers
 2.8.2. Bargaining Power of Customers
 2.8.3. Threat of New Entrants

- 2.8.4. Threat of Substitutes
- 2.8.5. Competitive Rivalry
- 2.9. SWOT Analysis

3. AEROSPACE PRESSURE BULKHEADS MARKET ANALYSIS – BY AIRCRAFT TYPE

- 3.1. Strategic Insights
- 3.2. Narrow-Body Aircraft Pressure Bulkheads Market Trend and Forecast (US\$ Million and Units)
- 3.3. Wide-Body Aircraft Pressure Bulkheads Market Trend and Forecast (US\$ Million and Units)
- 3.4. Very Large-Body Aircraft Pressure Bulkheads Market Trend and Forecast (US\$ Million and Units)
- 3.5. Regional Aircraft Pressure Bulkheads Market Trend and Forecast (US\$ Million and Units)
- 3.6. Business Jet Pressure Bulkheads Market Trend and Forecast (US\$ Million and Units)

4. AEROSPACE PRESSURE BULKHEADS MARKET ANALYSIS – BY PLATFORM TYPE

- 4.1. Strategic Insights
- 4.2. B737 Pressure Bulkheads Market Trend and Forecast (US\$ Million and Units)
- 4.3. B777 Pressure Bulkheads Market Trend and Forecast (US\$ Million and Units)
- 4.4. B787 Pressure Bulkheads Market Trend and Forecast (US\$ Million and Units)
- 4.5. B737 Max Pressure Bulkheads Market Trend and Forecast (US\$ Million and Units)
- 4.6. B777x Pressure Bulkheads Market Trend and Forecast (US\$ Million and Units)
- 4.7. A320 Family Pressure Bulkheads Market Trend and Forecast (US\$ Million and Units)
- 4.8. A330/340 Pressure Bulkheads Market Trend and Forecast (US\$ Million and Units)
- 4.9. A350XWB Pressure Bulkheads Market Trend and Forecast (US\$ Million and Units)
- 4.10. A380 Pressure Bulkheads Market Trend and Forecast (US\$ Million and Units)
- 4.11. A320 neo Pressure Bulkheads Market Trend and Forecast (US\$ Million and Units)
- 4.12. A330 neo Pressure Bulkheads Market Trend and Forecast (US\$ Million and Units)
- 4.13. E 175 Pressure Bulkheads Market Trend and Forecast (US\$ Million and Units)
- 4.14. A220 Pressure Bulkheads Market Trend and Forecast (US\$ Million and Units)
- 4.15. Other Program Pressure Bulkheads Market Trend and Forecast (US\$ Million and Units)

5. AEROSPACE PRESSURE BULKHEADS MARKET ANALYSIS – BY MATERIAL TYPE

- 5.1. Strategic Insights
- 5.2. Metal Pressure Bulkheads Market Trend and Forecast (US\$ Million and Units)
- 5.3. Composite Pressure Bulkheads Market Trend and Forecast (US\$ Million and Units)

6. AEROSPACE PRESSURE BULKHEADS MARKET ANALYSIS – BY SHAPE TYPE

- 6.1. Strategic Insights
- 6.2. Flat Pressure Bulkheads Market Trend and Forecast (US\$ Million and Units)
- 6.3. Curved Pressure Bulkheads Market Trend and Forecast (US\$ Million and Units)

7. AEROSPACE PRESSURE BULKHEADS MARKET ANALYSIS – BY MANUFACTURING PROCESS TYPE

- 7.1. Strategic Insights
- 7.2. Sheet-Stamped Pressure Bulkheads Market Trend and Forecast (US\$ Million and Units)
- 7.3. Resin-Infused Pressure Bulkheads Market Trend and Forecast (US\$ Million and Units)
- 7.4. Prepreg-Laid Pressure Bulkheads Market Trend and Forecast (US\$ Million and Units)

8. AEROSPACE PRESSURE BULKHEADS MARKET ANALYSIS – BY REGION

- 8.1. Strategic Insights
- 8.2. North American Aerospace Pressure Bulkheads Market Trend and Forecast by Country (US\$ Million and Units)
 - 8.2.1. The USA: Aerospace Pressure Bulkheads Market Trend and Forecast (US\$ Million and Units)
 - 8.2.2. Canada: Aerospace Pressure Bulkheads Market Trend and Forecast (US\$ Million and Units)
 - 8.2.3. Mexico: Aerospace Pressure Bulkheads Market Trend and Forecast (US\$ Million and Units)
- 8.3. European Aerospace Pressure Bulkheads Market Trend and Forecast, by Country (US\$ Million and Units)
 - 8.3.1. Germany: Aerospace Pressure Bulkheads Market Trend and Forecast (US\$

Million and Units)

8.3.2. France: Aerospace Pressure Bulkheads Market Trend and Forecast (US\$ Million and Units)

8.3.3. Russia: Aerospace Pressure Bulkheads Market Trend and Forecast (US\$ Million and Units)

8.3.4. Rest of Europe: Aerospace Pressure Bulkheads Market Trend and Forecast (US\$ Million and Units)

8.4. Asia-Pacific's Aerospace Pressure Bulkheads Market Trend and Forecast, by Country (US\$ Million and Units)

8.4.1. Japan: Aerospace Pressure Bulkheads Market Trend and Forecast (US\$ Million and Units)

8.4.2. China: Aerospace Pressure Bulkheads Market Trend and Forecast (US\$ Million and Units)

8.4.3. Rest of Asia-Pacific: Aerospace Pressure Bulkheads Market Trend and Forecast (US\$ Million and Units)

8.5. Rest of the World's (RoW) Aerospace Pressure Bulkheads Market Trend and Forecast, by Country (US\$ Million and Units)

8.5.1. Latin America: Aerospace Pressure Bulkheads Market Trend and Forecast (US\$ Million and Units)

8.5.2. The Middle East: Aerospace Pressure Bulkheads Market Trend and Forecast (US\$ Million and Units)

8.5.3. Others: Aerospace Pressure Bulkheads Market Trend and Forecast (US\$ Million and Units)

9. COMPETITIVE ANALYSIS

9.1. Strategic Insights

9.2. Presence by Material Type

9.3. Geographical Presence

9.4. Market Share Analysis

10. STRATEGIC GROWTH OPPORTUNITIES

10.1. Strategic Insights

10.2. Market Attractive Analysis

10.2.1. Market Attractiveness by Aircraft Type

10.2.2. Market Attractiveness by Platform Type

10.2.3. Market Attractiveness by Material Type

10.2.4. Market Attractiveness by Shape Type

- 10.2.5. Market Attractiveness by Manufacturing Process Type
- 10.2.6. Market Attractiveness by Region
- 10.3. Growth Matrix Analysis
- 10.4. Emerging Trends
- 10.5. Key Success Factors

11. COMPANY PROFILE OF KEY PLAYERS

- 11.1. Aernnova Aerospace S.A.
- 11.2. Airbus Group
- 11.3. AVIC SAC Commercial Aircraft Company Ltd.
- 11.4. Bombardier Inc.
- 11.5. Kawasaki Heavy Industries, Ltd.
- 11.6. Premium AEROTEC GmbH
- 11.7. RUAG Holding AG
- 11.8. Spirit AeroSystems GmbH
- 11.9. Triumph Group

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