

AFP/ATL Machines Market by Machine Type (AFP, ATL, and Hybrid AFP/ATL), by End-User Type (Tier Players, OEMs, and Others), and by Region (North America, Europe, Asia-Pacific, and Rest of the World), Forecast, Competitive Analysis, and Growth Opportunity: 2019-2024

<https://marketpublishers.com/r/AE286E3F002EN.html>

Date: February 2019

Pages: 181

Price: US\$ 4,790.00 (Single User License)

ID: AE286E3F002EN

Abstracts

This strategic assessment report, from Stratview Research, studies the AFP/ATL machines market for the forecast period of 2019 to 2024 in terms of both value and units. 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. This report can be decisive especially for the composites industry stakeholders for the identification of the low-hanging fruits available in the market in order to expedite their growth.

The AFP/ATL Machines Market: Highlights

The disruptive journey of composites in various industries has not been hidden from the world, especially in the aerospace, automotive, wind energy, and marine industries. Among all, aerospace is one industry that has witnessed excellent penetration of advanced composites in the crucial sections including fuselage and wings in the next-generation aircraft: B787 and A350XWB. Today, all the major airframers are not developing their next-generation aircraft without considering the use of composites.

However, the road to success for composites in the aircraft industry was not that easy as it seemed; prepregs are the most felicitous material for fabricating composite parts, that are laid in layers manually, generally at a rate of 2.5 lbs. per hour. It was impossible to fabricate a large number of composite parts with such a low layup rate. In order to

meet this challenge, a close collaboration between aircraft OEMs, tier players and composites industry stakeholders was required to develop advanced processes that are fully automated and have an extremely higher layup rate with increased part performance. This factor has led to the successful development of AFP/ATL machines for fabricating aircraft structural parts including fuselage and wings at a greater speed. AFP/ATL machine suppliers are continuously advancing the AFP/ATL processes, especially targeting the increase in the layup rate and the reduction in waste.

The global AFP/ATL machines market is forecasted to grow at an impressive rate over the next five years to reach an estimated value of US\$ 294.7 million in 2024. The growth of AFP/ATL machines is governed by vast number of factors, among which the benefits offered by these machines over traditional hand layup process coupled with organic growth of the aerospace industry is the prime growth driver. AFP/ATL machines lay prepreg material efficiently at a rate of more than 50 lbs. per hour with improved part quality, which is not possible with the traditional hand layup process. A skilled technician can generally lay prepreg at 2.5 lbs. per hour. These machines are playing a pivotal role in achieving OEMs' focus on the development of lightweight composite parts with reduced cycle time.

Automotive, wind energy and marine are likely to be new focus areas for the market participants in the coming years as these industries are increasingly working on the development of manufacturing processes that efficaciously address their pain areas related to prepreg part manufacturing. Low-cost robotic AFP machine is one such effort made by the machine suppliers that is low cost and speedily lays up prepreg to meet the industry requirements.

The global AFP/ATL machines market is segmented based on the machine type as AFP Machine, ATL Machine, and Hybrid AFP/ATL Machine. AFP machine is expected to remain dominant over the next five years, owing to the development of low-cost AFP machines and increasing acceptance of these machines in a wide array of industries including automotive and space.

Based on the end-user type, the market is segmented as Tier Players, OEMs, and Others. Tier players and OEMs are likely to remain the major procurers of these machines in coming years. Others mainly include universities and research centers, who generally procure AFP/ATL machines for the research and developments purpose to find an innovative solution for various industries.

Based on the region, North America is expected to remain the largest market during the

forecast period. The USA is the growth engine of the region's market with the presence of all major aircraft OEMs, tier players, and major AFP/ATL machine suppliers. Asia-Pacific is likely to witness the highest growth during the same period, driven by a host of factors including increasing demand for commercial aircraft to support rising passenger traffic and upcoming indigenous commercial and regional aircraft (COMAC C919 and Mitsubishi MRJ).

The supply chain of this market comprises raw material and component suppliers, AFP/ATL machine suppliers, tier players/part fabricators, distributors, OEMs, airlines, aircraft leasing companies, and MRO companies. The key AFP/ATL machine manufacturers are M.Torres Diseños Industriales S.A.U, Electroimpact Inc., Coriolis Composites technologies SAS, Ingersoll Machine Tools Inc., Fives, Accudyne System, Inc., Automated Dynamics, and Mikrosam AD. The development of low-cost robotic AFP machines, close engagement with OEMs for the development of custom machines addressing specific requirements of clients, 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 1,000 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. About 22 detailed primary interviews with the market players across the value chain in all four regions and industry experts have been executed 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 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 AFP/ATL Machines Market is segmented into the following categories.

AFP/ATL Machines Market by Machine Type:

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

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

Hybrid AFP/ATL Machine (Regional Analysis: North America, Europe, Asia-Pacific, and RoW)

AFP/ATL Machines Market, By End-User Type

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

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

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

AFP/ATL Machines Market, By Region

North America

Europe

Asia-Pacific

Rest of the World

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)

AFP/ATL Machines Market by Machine Type (AFP, ATL, and Hybrid AFP/ATL), by End-User Type (Tier Players, OEMs,...

SWOT analysis of key players (up to 3 players)
Regional Segmentation

Current market size (2018) of AFP or ATL machines by End-User Type

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