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Aircraft Aerostructures Market by Aircraft Type (Narrow-Body Aircraft, Wide-Body Aircraft, Very Large-Body Aircraft, Regional Aircraft, General Aviation, Helicopter, Military Aircraft, and UAV), by Material Type (Metal Aerostructures and Composite Aerostructure), by Application Type (Fuselage, Wings, Empennages, Nacelles & Pylons, and Others), by Sales Channel Type (OEMs, Tier-I, and Tier-II), 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 aircraft aerostructures market over the trend period of 2013 to 2018 and forecast period of 2019 to 2024 with high emphasis on accurate market data, insights and competitive landscapes. The report segments and analyzes the market in the most detailed manner in order to provide a panoramic view of the market. The vital data/information provided in the report can play a crucial role for the market participants as well as investors in the identification of low-hanging fruits available in the market as well as to formulate the growth strategies to expedite their growth process.

Aircraft Aerostructures Market: Highlights
As per Stratview Research, the global aircraft aerostructures market is projected to grow at a healthy rate over the next five years to reach US$ 82.9 billion in 2024. Increasing commercial and regional aircraft deliveries, increasing production rates of the

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next-generation aircraft (B787 and A350XWB) programs, increasing penetration of composites in aircraft structures, and advancements in the technologies are some major factors that are underpinning the growth of the aircraft aerostructures market.

Aerostructures are the most vital parts of an aircraft. The demand and growth of the aerostructures market are highly governed by commercial aircraft deliveries. Advancements in design, materials, and processes have assisted the industry to grow faster, meeting airlines' needs. Aerostructure holds the largest share of more than 30% in the overall aircraft production value, followed by aero-engines, avionics, systems & electronics, and interiors. The growing wealth of emerging economies, which is triggering accessibility to air traffic, is a preeminent factor leading to a rise in passenger traffic or trips per capita across the globe. This, in turn, is leading to the demand for newer aircraft, which is pushing the global aerostructures market.

A trend that will most probably be impacting the competitive dynamics of the market, is expected shift in the manufacturing of aerostructures from tier players to OEMs. The year 2018 witnessed a large number of high-value M&A activities in the industry. Major tier players acquired other tier players with an aim to capture a larger chunk of the market. However, this led to the announcement made by Boeing and Airbus to increasingly backward-integrate themselves by making crucial components including aerostructures for their upcoming programs. Recent market consolidation at tier-I level due to a large number of mergers & acquisitions among tier players has compelled both the airframers to go back with their former strategy of making crucial parts in-house. This consolidation at tier level may curtail the bargaining power of OEMs to some extent. Also, the major tier-I players generally enjoy higher margins than OEMs, which is another factor pushing OEMs to increasingly produce crucial aircraft parts in-house. Boeing's move of making wings for its upcoming aircraft program B777x in-house is one of the major examples of such a shift that is taking place in the market.

The market is segmented based on the aircraft type as narrow-body aircraft, wide-body aircraft, very large-body aircraft, regional aircraft, general aviation, helicopter, military aircraft, and UAV. Narrow-body aircraft is likely to remain the largest segment of the market during the forecast period. Increasing production rates of the key programs such as B737 and A320 family; market entry of new players such as COMAC and Irkut; and introduction of variants of existing and upcoming aircraft programs such as B737 max, A320neo and COMAC C919, are likely to create a strong demand for aerostructures in the narrow-body aircraft segment. Wide-body aircraft is likely to remain the second-largest segment during the forecast period and is expected to grow at an impressive rate during the forecast period.

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Based on the material type, the market is segmented as metal aerostructures and composite aerostructures. Metal aerostructure is likely to remain the larger segment, whereas composite aerostructure is likely to witness higher growth over the next five years. Airliners are aggressively seeking lightweight composite parts/structures that can contribute to their goal of achieving higher fuel efficiency and reducing emissions. This has resulted in an increased demand for composite aerostructures. A350XWB and B787 are the growth engines for composite aerostructures. Fuselage and wings of the A350XWB and B787 programs are the major applications made of composites instead of metals, unlike other aircraft.

Based on the application type, the market is segmented as fuselage, wings, empennages, nacelles & pylons, and others. The fuselage is projected to remain the largest application segment of the aircraft aerostructures market during the forecast. Fuselage is the principal component of an aircraft as it covers the main body section of an aircraft. A typical narrow-body aircraft's fuselage has length of about 33.6 meters and height of about 4 meters. Wings are likely to experience the highest growth in the market due to a gradual shift from metal to composite wings in the modern aircraft models. Upcoming aircraft program B777x is an example of such shift as it has composite wings instead of metal wings.

Based on the region, North America is projected to remain the largest market during the forecast period, driven by the USA. The country is the hub of the aerospace industry with the presence of several tier players and aircraft OEMs. Asia-Pacific is likely to depict the highest growth during the forecast period. The region is likely to remain the most eye-catching market in the foreseeable future, mainly driven by the upcoming commercial and regional aircraft, such as C919 and MRJ, and the opening of assembly plants in China by Boeing and Airbus, and the largest commercial aircraft fleet size.

The supply chain of this market comprises raw material suppliers, tier players, OEMs, distributors, and airlines. The key aerostructure manufacturing companies are Spirit AeroSystems Inc., GKN PLC, UTC Aerospace Systems, Premium Aerotech GmbH, Triumph Group, Mitsubishi Aircraft Corporation, STELIA Aerospace S.A.S., Safran SA, Leonardo SPA, Kawasaki Heavy Industries Ltd, FACC AG, Korean Aerospace Industries, Ltd., and Subaru Corporation. Development of lightweight structures, speeding up of production rates, mergers & acquisitions, and collaborations with OEMs for the joint development of aerostructures are some of the strategies adopted by the major players in order to gain a competitive edge in the market.

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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 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. We conducted about 15 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, New 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 aircraft aerostructures market is segmented into the following categories:

Aircraft Aerostructures Market, By Aircraft Type

Narrow-Body Aircraft (Regional Analysis: North America, Europe, Asia-Pacific, and RoW)
Wide-Body Aircraft (Regional Analysis: North America, Europe, Asia-Pacific, and RoW)
Very Large-Body Aircraft (Regional Analysis: North America, Europe, Asia-Pacific, and RoW)
Regional Aircraft (Regional Analysis: North America, Europe, Asia-Pacific, and RoW)

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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)
UAV (Regional Analysis: North America, Europe, Asia-Pacific, and RoW)
Aircraft Aerostructures Market, By Material Type

Metal Aerostructures (Regional Analysis: North America, Europe, Asia-Pacific, and RoW)
Composite Aerostructures (Regional Analysis: North America, Europe, Asia-Pacific, and RoW)
Aircraft Aerostructures Market, By Application Type

Fuselage (Regional Analysis: North America, Europe, Asia-Pacific, and RoW)
Wings (Regional Analysis: North America, Europe, Asia-Pacific, and RoW)
Empennage (Regional Analysis: North America, Europe, Asia-Pacific, and RoW)
Nacelles & Pylons (Regional Analysis: North America, Europe, Asia-Pacific, and RoW)
Others (Regional Analysis: North America, Europe, Asia-Pacific, and RoW)
Aircraft Aerostructures Market, By Sales Channel Type

OEMs (Regional Analysis: North America, Europe, Asia-Pacific, and RoW)
Tier-I Sales (Regional Analysis: North America, Europe, Asia-Pacific, and RoW)
Tier-II Sales (Regional Analysis: North America, Europe, Asia-Pacific, and RoW)
Aircraft Aerostructures Market, By Region

North America (Country Analysis: The USA, Canada, and Mexico)
Europe (Country Analysis: France, Germany, the UK, Spain, Russia, and Rest of Europe)
Asia-Pacific (Country Analysis: Japan, China, India, 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 3 players)
SWOT analysis of key players (up to 3 players)
Market Segmentation

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Current market segmentation of any one of the application types by material type
Competitive Benchmarking

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

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8. COMPETITIVE ANALYSIS

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9. STRATEGIC GROWTH OPPORTUNITIES

10. COMPANY PROFILES OF KEY PLAYERS

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