

# **Aircraft Cabin Interior Composites Market by Aircraft Type (Narrow-Body Aircraft, Wide-Body Aircraft, Very Large Aircraft, Regional Aircraft, and General Aircraft), by Application Type (Floor Panels, Sidewall Panels, Ceiling Panels, Stowage Bins, Galleys, Lavatories, Seating, Ducts, and Others), by Composite Type (Glass Fiber Composites, Carbon Fiber Composites, and Others), by Process Type (Sandwich Construction, Compression Molding, and Others), by End-User Type (OE and Aftermarket), and by Region (North America, Europe, Asia-Pacific, and Rest of the World), Trend, Forecast, Competitive Analysis, and Growth Opportunity: 2018-2023**

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## **Abstracts**

This report, from Stratview Research, studies the global aircraft cabin interior composites market over the trend period of 2012 to 2017 and forecast period of 2018 to 2023. 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 Aircraft Cabin Interior Composites Market: Highlights

The aircraft cabin is one of the most discussed subjects of the airline industry today as airlines' requirement for aesthetically pleasing, compact, and innovative aircraft cabin

interiors show no signs of abating. One side, volatile crude oil prices severally plummet the overall margin of airlines, whereas, another side, rapidly changing expectations of customers demand airlines to keep upgrading aircraft interiors, which again adversely impact the overall margin of airlines. Low-cost carriers are demanding an aircraft that has maximum space for seating to generate more revenues per journey, whereas, premium airlines targeting high-end customers would like to offer extraordinary passenger comfort in order to give excellent customer delight. However, both types of carriers want to maintain the value as well as to generate maximum return; thus, wanting a cabin interior that is as light as possible and occupies minimal space and energy.

The aircraft cabin interiors have witnessed an impactful, significant evolution over the past five decades in which composite materials have a disruptive journey and played a pivotal role in upgrading the overall cabin interiors. All the major tier-II players are working closely with the aircraft OEMs in order to develop advanced lightweight interior systems that offer excellent aesthetics and aid carriers to improve the overall customer experience. Composite materials are the perennial choice in fabricating structural parts of those systems as the materials not only offer the advantages of being light in weight and high strength-to-weight ratio, but also improve the overall cabin aesthetics. The modernized aircraft cabin interior design is rich in composites from structural to semi-structural applications.

There are a series of directions where the aircraft industry is moving today with the purpose to modernize cabin interiors by satisfying three major criteria: commercial viability, certification, and passenger experience. Some of the most noticeable movements are the development of lightweight customized cabin solutions in order to improve the overall customer experience, an enlargement of overhead stowage bins to accommodate more luggage per stowage bin, the formation of maximum cabin space by making necessary change in the design of galleys and lavatories to squeeze more number of seats on board, and the development of compact seats to add more seats. Composite parts are an indispensable focus area for all the major tier-players making cabin interior systems, such as lavatory, galleys, to make the system lightweight, aesthetically excellent without sacrificing performance.

The global aircraft cabin interior composites market is projected to grow at a healthy rate over the next five years to reach US\$ 1,891.1 million in 2023. Organic growth of the aircraft industry is the primary driver of the sustainable demand for composites in aircraft cabin interiors. Boeing anticipated that there would be total deliveries of 41,030 commercial aircraft worth US\$ 6.1 trillion in the global marketplace during 2017-2036.

Asia-Pacific and North America would be the biggest demand generators with a combined share of 60.2% of the total commercial aircraft deliveries during 2017-2036. An expected healthy CAGR of 4.7% in air passenger traffic during 2017-2036 will chiefly drive the demand for commercial aircraft. This factor will create a sustainable demand for composite parts for cabin interiors globally in the foreseeable future.

In addition to that, Boeing and Airbus had a combined total order backlog of 13,129 commercial aircraft by the end of 2017. These huge pile of order backlogs of commercial aircraft will allow both airframers to roll out their aircraft continuously for the next nine years at current build rates. However, they have strategically been raising the production rates of their key commercial aircraft programs in order to deliver aircraft to their widespread clients at a shorter period of time. Also, they have been introducing fuel-efficient variants of their best-selling aircraft programs with the purpose to address the biggest requirement of the airline industry, which is the fuel-efficient aircraft.

Secondly, composites have an excellent track record in the aircraft industry as the material offers numerous advantages over its rivals including high strength-to-weight ratio, excellent corrosion resistance, excellent fatigue strength, and excellent durability at lightweight. The material is a suitable claimant addressing many challenges of the industry including lightweight systems. The materials are increasingly penetrating not only airframe parts, such as fuselage, in the next-generation aircraft but also in aircraft interiors including galleys, HVAC ducts, and overhead stowage bins.

Cabin upgrade is another factor creating a significant opportunity for composites. In general, first- and business-class cabins are frequently refurbished than the economy cabins. Also, airline profitability is having a major impact on discretionary spending for upgrades. Lower crude oil prices allowed airlines to make more profit, thus, spending more on cabin upgrades, such as larger overhead bins and compact lavatories.

Safety is another factor that is again boosting the demand for composite parts in aircraft cabin interiors. For instance; aircraft seats are required to withstand a dynamic 16g force. In the 16g test, two distinct dynamic tests are conducted, which ultimately stimulates the loads that could be expected in an impact-survivable accident. The helps to survive passengers in the case of a fatal accident. The selection of materials for seating application largely depends upon such regulations. Composite parts excel in most of the parameters with the advantages of being light in weight.

The global aircraft cabin interior composites market is segmented based on the aircraft type as Narrow-Body Aircraft, Wide-Body Aircraft, Very Large Aircraft, Regional Aircraft,

and General Aviation. Narrow- and wide-body aircraft are likely to remain the growth engines of the market during the forecast period. Increasing production rates of key programs, such as B737, A320 family, B787, and A350XWB; market entry of new players, such as COMAC and Irkut; introduction of variants of existing best-selling aircraft programs, such as B737 max, A320neo, and B777x; and an increasing demand for cabin retrofit of large aircraft fleet are likely to offer a sustainable growth platform for composites in these segment in the coming years. Furthermore, rising penetration of composites in most of the interior applications is likely to aid more growth in these segments in the coming years.

Based on the composite type, glass fiber composite is likely to remain the most dominant segment of the global aircraft cabin interior composites market over the next five years. Glass fiber composites offer a wide array of advantages including low cost, good product performance, and excellent corrosion resistance, over their rivals including aluminum and metals. Whereas, carbon fiber composite, another considerable segment, is likely to grow the highest in the market during the same period, driven by its advantages over glass fiber composites including lighter in weight, higher strength-to-weight ratio, and excellent appearance.

Based on the process type, sandwich construction is the most widely preferred manufacturing process in the market and is likely to remain the most dominant process during the forecast period. It is considered an ideal process for producing flat composite panels for aircraft interiors as well as exteriors. Most of the composite parts for aircraft cabin interiors, such as lavatory and floor panels, are largely made through the sandwich construction process. Compression molding, injection molding, and plaster mandrel are major processes used to fabricate composite parts for aircraft cabin interiors. They also offer sizeable growth opportunities in the coming years.

Based on the end-user type, the OE sales segment is projected to maintain its dominance in the market during the next five years. Increasing production rates of key programs, such as B737 and A320 family; market entry of new players, such as COMAC; and upcoming aircraft programs are likely to create a strong demand for composites in cabin interiors in the OE segment in the coming years. The aftermarket segment, a relatively smaller segment, is likely to grow at a higher rate during the forecast period, owing to rising aircraft fleet size of commercial aircraft and increasing demand for advanced lightweight cabin interiors, leading to the replacement/retrofit of old cabin interiors with the advanced lightweight interiors.

Based on the regions, North America is projected to remain the largest market during

the forecast period, driven by both OE as well as aftermarket segments. The USA is the growth engine of the region's market and has the presence of almost all major aircraft OEMs including Boeing, Airbus, Cessna, and Gulfstream. Rising commercial aircraft fleet size is likely to further boost the overall demand for composite parts in aircraft cabin interiors in the foreseeable future.

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, opening of assembly plants of Boeing and Airbus in China, upcoming indigenous commercial and regional aircraft (COMAC C919 and Mitsubishi MRJ), and rising aircraft fleet size.

The supply chain of this market comprises raw material suppliers, composite part fabricators, cabin interior manufacturers, OEMs, and airlines. The key cabin interior companies are AIM Altitude Limited (AVIC International), B/E Aerospace (Rockwell Collins), Diehl Aerosystems, FACC AG, Jamco Corporation, The Gill Corporation, The Nordam Group, Inc., Triumph Group Inc., UTC Aerospace Systems, and Zodiac Aerospace. The key aircraft OEMs are Boeing, Airbus, Bombardier, ATR, Embraer, COMAC, Irkut, Sukhoi, Cessna, and Gulfstream.

## **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 700 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 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 cabin interior composites market is segmented into the following categories.

#### Aircraft Cabin Interior Composites 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 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)

#### Aircraft Cabin Interior Composites Market, By Application Type

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

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

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

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

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

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

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

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

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

#### Aircraft Cabin Interior Composites Market, By Composites Type

Glass Fiber Composites (Regional Analysis: North America, Europe, Asia-Pacific, and RoW)

Carbon Fiber Composites (Regional Analysis: North America, Europe, Asia-Pacific, and RoW)

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

## Aircraft Cabin Interior Composites Market, By Process Type

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

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

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

## Aircraft Cabin Interior Composites Market, By End-User Type

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

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

## Aircraft Cabin Interior Composites 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: China, Japan, India, and Rest of Asia-Pacific)

Rest of the World (Country 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**

Current market segmentation of any one of the application by composites type

## **COMPETITIVE BENCHMARKING**

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

Custom Research: Stratview Research offers custom research services across sectors. In case of any custom research requirement related to market assessment, competitive benchmarking, sourcing and procurement, target screening, and others, please send your inquiry at [sales@stratviewresearch.com](mailto:sales@stratviewresearch.com)

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