

Aircraft Composite Enclosures Market by Aircraft Type (Commercial Aircraft, Regional Aircraft, Military Aircraft, and Others), by Shielding Type (Shielded Enclosures and Non-Shielded Enclosures), by Resin Type (PPS, PEEK, PEKK, and Others), by Fiber Type (Carbon Fiber Composites and Glass Fiber Composites), by Manufacturing Process Type (Injection Molding and Others) 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 aircraft composite enclosures 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 Composite Enclosures Market: Highlights

The global aircraft composite enclosures market is projected to grow at a healthy rate over the next five years to reach US\$ 199.0 million in 2023. Organic growth of aircraft production to support the rising passenger and freight traffic, an increased preference for composite parts over traditional metallic ones, and an increasing use of avionics in the next-generation aircraft are some of the key factors that are proliferating the

demand for composite enclosures in the aircraft industry.

Enclosures in an aircraft are cases or cabinets used to protect critical electronic components. Reduction in thermal loads, protection against aircraft fluids, protection from the environment, and shielding against EMI as well as static electricity are some essential functions performed by enclosures situated in an aircraft.

The aircraft industry has always been looking for different ways to reduce carbon emissions and to improve fuel economy. Switching from traditional metallic components to composite ones is one such way to achieve the requirements. A similar trend has also been observed in aircraft enclosures. Metallic enclosures are predominantly used in the aircraft industry, owing to their superior mechanical, thermal, and electrical properties; however, these enclosures are prone to corrosion and bring excess weight to an aircraft. The industry is keen to adopt composite enclosures which are not only lighter in weight as compared to metallic enclosures but also offer higher thermal loads and carry electrical properties.

The global aircraft composite enclosures market is segmented based on the aircraft type as Commercial Aircraft, Regional Aircraft, Military Aircraft, and Others. Commercial aircraft is likely to remain the growth engine of the market during the forecast period. Increase in the production rates of key aircraft programs, stringent emission norms for reducing carbon emissions, increase in the use of avionics in the aircraft, and rising penetration of composites are likely to aid growth to the segment in the coming years.

Based on the resin type, PPS is likely to remain the most dominant resin type in the aircraft composite enclosures market over the next five years. The resin type offers good dimensional stability even at an elevated temperature and in the harsh chemical environment. It also helps in molding complex parts with very tight tolerances and has an outstanding resistance to a wide variety of aggressive chemical environments and stability of dielectric and insulating properties over a wide range of conditions.

Based on the fiber type, carbon fiber composite is likely to remain the dominant segment of the market over the next five years, driven by its long list of advantages including lightweight, higher strength-to-weight ratio, good EMI performance, and better aesthetics. Glass fiber composites also offer a wide array of advantages including low cost, low weight, good product performance, and excellent corrosion resistance, over their rivals including aluminium and other metallic enclosures.

Based on the process type, injection molding is the most widely preferred manufacturing

process in the market and is likely to remain the most dominant process during the forecast period as well. It is considered to be an ideal process for mass-volume applications and has the ability to develop complex shapes in a very short cycle time with very fewer scrapes.

Based on the shielding type, the shielded enclosure is likely to remain the larger segment of the aircraft composite enclosures market during the forecast period. EMI shielded composite enclosures provide a combination of reflection and absorption of energy. The radiated energy from internal electronics is absorbed and dissipated in the shielded composite enclosures.

Based on regions, North America is projected to remain the largest market during the forecast period. The USA is the growth engine of the North American aircraft composite enclosures market. Presence of major aircraft manufacturers, tier players, and enclosure manufacturers primarily drive the demand for composite enclosures in the country. The country is not only the largest market in North America, but it is also the largest market in the world. Asia-Pacific is likely to depict the highest growth during the same period, driven by China, India, and Japan. All these three countries would remain the growth engines of the region's market for aircraft composite enclosure over the next five years.

The supply chain of this market comprises raw material suppliers, composite enclosure manufacturers, avionics suppliers, aircraft OEMs, and airlines. Major composite enclosure manufacturing companies are TE Connectivity, Kaman Aerospace (Vermont Composites Inc), Carlisle Interconnect Technologies, AIM Aerospace, Automated Dynamics, and Connective Design Inc. The development of lightweight enclosures and collaborations with OEMs for the joint development of enclosures are some of the strategies adopted by the major players in order to gain the 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 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 composite enclosures market is segmented into the following categories:

Aircraft Composite Enclosures Market, By Aircraft Type

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

Regional Aircraft (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)

Aircraft Composite Enclosures Market, By Shielding Type

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

Non-Shielded Enclosures (Regional Analysis: North America, Europe, Asia-Pacific, and RoW)

Aircraft Composite Enclosures Market, By Resin Type

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

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

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

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

Aircraft Composite Enclosures Market, By Fiber Type

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

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

Aircraft Composite Enclosures Market, By Process Type

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

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

Aircraft Composite Enclosures Market, By Region

North America (Country Analysis: The USA, Rest of North America)

Europe (Country Analysis: France, Germany, the UK, 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 aircraft type by composite type

Aircraft Composite Enclosures Market by Aircraft Type (Commercial Aircraft, Regional Aircraft, Military Airca...

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.

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