

Aircraft Decorative Laminates Market by Aircraft Type (Narrow-Body Aircraft, Wide-Body Aircraft, Very Large Body Aircraft, Regional Aircraft, and General Aviation), by Application Type (Interior Panels, Overhead Stowage Bins, Seats, Galleys, and Others), by Laminate Type (Film Laminate and Reinforced Laminate), 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: 2019-2024

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Abstracts

This report, from Stratview Research, studies the aircraft decorative laminates market over the trend period from 2013 to 2018 and 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.

Aircraft Decorative Laminates Market: Highlights

The evolution of decorative laminates in the aviation industry started when the aircraft cabin fire safety standard was implemented. This led to a significant research in the areas related to finding cost-effective solutions that ensure the materials used in cabin interiors comply with new standards. The constant focus of airlines and aircraft OEMs to increase the profit margins along with the implementation of stringent fire, smoke, and toxicity (FST) standard has paved the path to the development of decorative laminates. The deployment of decorative laminates in cabin interiors not only minimizes the

probability of replacing the big-ticket interior parts but also eliminates the paint-preparation activities on the parts where paints are applied.

The market for decorative laminates in the global aircraft industry is likely to grow at a rate above the industry growth rate over the next five years to reach an estimated value of US\$ 344.1 million in 2024. Several factors bolstering the demand for decorative laminates in the industry are increasing production rates of the next-generation aircraft, increasing focus of airlines on the modernization of interiors of their existing aircraft fleet to provide uniform feel, high focus of the aircraft industry stakeholders for the development of lightweight and smart cabin interior solutions, and rising aircraft fleet.

Among all, the biggest factor is the rising commercial aircraft fleet. Boeing, in its 2018-2037 outlook, stated that the global commercial and regional aircraft fleet would reach an estimated 48,540 passenger and freighter aircraft by the end of 2037 from the current level of 24,400 aircraft, growing at a CAGR of 3.7% over the next twenty years. Out of the total fleet of 48,540 aircraft by the end of 2037, new deliveries will account for 42,730 aircraft, whereas rest 5,810 aircraft would be remaining old fleet. Asia-Pacific and Europe would be the biggest fleet owners with a combined share of 60% of the total fleet at the end of 2037. Most of the interior systems including galleys and panels are periodically replaced (at least twice in aircraft life), which assure a substantial demand for composite parts incorporated with decorative laminates for aircraft interiors globally in the foreseeable future.

Also, the major aircraft OEMs, especially Boeing and Airbus, are introducing next-generation aircraft with advanced interiors offering passenger and crew members more comfort and pleasing aesthetics. Airlines acquiring these newer aircraft are also upgrading their existing aircraft fleet to maximize the comfort level of their passengers by providing uniform feel across its aircraft fleet. This again, is generating strong demand for interior systems containing decorative films.

Concurrently, the airline industry has been witnessing increased investment towards the modification of aircraft interiors, especially for the development of a compact, lightweight and foldable seats, and increased demand for premium economy seats. The change in aircraft cabin interiors to increase the number of seats in an aircraft in order to enhance airlines' profit along with advancement in decorative laminate products to address emerging technologies such as Wi-Fi and onboard connectivity, are also positively impacting the market growth.

The focus of the industry regarding the comfort and safety of passengers has

unanimously emerged in the past few decades. Premium airlines, as well as low-cost carriers, are trying to maximize the comfort and safety of passengers and crew members by enhancing aircraft interiors. This is also generating gargantuan pressure on tier players as well as raw material suppliers including decorative laminate manufacturers. All the leading aircraft decorative laminate manufacturers are putting their efforts to develop high-performance decorative laminate products, which will give more aesthetic and pleasing looks along with adequate passenger safety.

The 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 the key programs such as B737, B787, A320, and A350XWB; introduction of variants of the best-selling programs (A320neo, B737 Max, B777x, and A330neo); market entry of new aircraft (C919 and MC-21); increasing demand for high quality and lightweight components; and rising aircraft fleet size are the major growth drivers of the market in these segments during the forecast period.

Based on the application type, the market is segmented into Interior Panels, Stowage Bins, Seats, Galleys, and Others. Interior panel is expected to remain the dominant application segment of the market during the forecast period, owing to its large surface area. Other applications include bulkheads/partition walls, lavatories, trolleys, cabin facings, closets, and passenger service units.

In terms of region, North America is expected to remain the largest market for aircraft decorative laminates 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, raw material suppliers, and decorative laminate suppliers. Asia-Pacific is likely to witness the highest growth in the same period, driven by a host of factors including an 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, decorative laminate manufacturers, aircraft cabin interior part fabricators, distributors, aircraft OEMs, airlines, aircraft leasing companies, and MRO companies. The key decorative laminate manufacturers are ISOVOLTA AG, Schneller LLC, DUNMORE Corporation, E. I. du Pont de Nemours and Company, and the Boeing Company. The development of high-performance aircraft decorative laminates, expansion in untapped and growing markets,

and the 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 700 authenticated secondary sources, such as annual reports, fact book, press release, journals, investor presentation, white papers, patents, and articles, have been leveraged to gather the data. About 10 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 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 market is segmented into the following categories:

Aircraft Decorative Laminates 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)

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

Aircraft Decorative Laminates Market, by Application Type

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

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

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

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

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

Aircraft Decorative Laminates Market, by Laminate Type

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

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

Aircraft Decorative Laminates 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 Decorative Laminates Market, by Region

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

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

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

Rest of the World (Country Analysis: Brazil, Argentina, and Others)

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)

A SWOT analysis of key players (up to 3 players)

Regional Segmentation

Current market size (2018) of aircraft decorative laminates in any of the North American country by laminate type.

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