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Aircraft Fastener Coatings Market by Aircraft Type (Commercial Aircraft, Regional Aircraft, General Aviation, Helicopter, and Military Aircraft), by Application Type (Engine, Aerostructures, Interiors, and Others), by Coating Type (Cadmium Coating, Dry Lubricant, Silver Coating, Aluminium Coating, and Others), by Process Type (Spray Coating, Dip Coating, Electroplating, and Others), and by Region (North America, Europe, Asia-Pacific, and Rest o2023f the World), Trend, Forecast, Competitive Analysis, and Growth Opportunity: 2018-2023

https://marketpublishers.com/r/AFF280C641CEN.html
Date: August 2018
Pages: 254
Price: US$ 4,790.00 (Single User License)
ID: AFF280C641CEN

Abstracts

This report, from Stratview Research, studies the global aircraft fastener coatings market over the trend period of 2012 to 2017 and the 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 Fastener Coatings Market: Highlights

Fasteners are one of the most critical components in the aircraft industry as they play a vital role in achieving tight assembly of aircraft parts. Fasteners have a very large share in hardware components used in an aircraft, as about 45%-50% of the components used in an aircraft are fasteners. For instance; Airbus' A380 aircraft has six million components out of which more than three million are fasteners. Most of the fasteners

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used in an aircraft have to be treated with a layer of coating which is also termed as plating. Fasteners are being placed in very critical application areas, which are prone to temperature fluctuations and corrosion environments.

Fasteners deployed in an aircraft usually don’t have the capability to act against stress-corrosion, electrochemical corrosion, fatigue corrosion, chemical and atmospheric corrosion, withstanding temperature extremes, and maintain strength throughout their lifespan. This creates a strong need for coated fasteners in order to protect and sustain in various environmental conditions. There are various types of coatings used on aircraft fasteners, which are usually different from the coatings, such as epoxy and polyurethane coatings, used on aircraft components.

The global aircraft fastener coatings market is projected to grow at a healthy rate over the next five years and reach an estimated value of US$ 1,182.0 million in 2023. Organic growth of aircraft industry is the primary driver of the sustainable demand for fastener coatings. Boeing anticipated that there would be total deliveries of 40,410 commercial aircraft worth US$ 6.24 trillion in the global marketplace during 2018-2037. Asia-Pacific and Europe would be the biggest demand generators with a combined share of 64.7% of the total commercial aircraft deliveries during 2018-2037. An expected healthy CAGR of 4.7% in air passenger traffic during 2018-2037 will chiefly drive the demand for commercial aircraft. Growing aircraft fleet size is another factor elevating the demand for fastener and coating materials for them.

In addition to that, Boeing and Airbus had a combined total order backlog of 13,129 commercial aircraft at the end of 2017. However, manufacturers are increasing production rates of their key commercial aircraft programs in order to deliver aircraft to their widespread clients for 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.

However, growing usage of composites in next-generation aircraft is demanding adhesives and special bonding techniques, the substitute materials of fasteners. This is corresponding to a lower demand for fasteners in the industry and so are coatings used for it. Furthermore, production of these composite rich aircraft, mainly B787 and A350XWB, is increasing that is sharpening its impact on the demand for fasteners and their coating materials.

The market is segmented based on the aircraft type as Commercial aircraft, Regional aircraft, General aircraft, Helicopter, and Military aircraft. Commercial aircraft is likely to

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remain the largest aircraft type in the market during the forecast period. The aircraft type is also likely to witness the highest growth during the same period. Increasing production rates of key programs, such as B737 and A320 family; market entry of new players, such as COMAC; upcoming aircraft programs or introduction of variants of existing programs, such as B737max and COMAC C919; and rising commercial aircraft fleet are the major factors that are driving the demand for fastener coatings in the segment.

Based on the coating type, the market is segmented as cadmium coating, dry lubricant, silver coating, aluminum coating (IVD aluminum), and others. Coating material for fasteners is largely dependent on the materials and application where it is used. Cadmium coating is likely to remain the most dominant segment of the market over the next five years. It is only permitted for some applications in aircraft and for some other industries, but it is severely restricted in many countries. Cadmium offers a wide array of advantages including high corrosion resistance, good conductivity for EMI shielding, electrical bonding and lightning strike protection, and inherent lubricity that reduces galling. Dry lubricant, another considerable segment, is likely to witness an impressive growth rate in the market during the same period, driven by a host of factors, such as excellent ability to work in extreme temperatures, good thermal break down, and reduction of friction between surfaces in the extreme environment.

Based on the application type, aerostructure is projected to maintain its dominance in the market over the next five years. The manufacturing and assembly of aerostructure parts alone require millions of fasteners. There is a need for coatings on these fasteners to protect them from the external environment and to retain their strength for the long run. Different applications require different coating types for fasteners depending upon the performance requirement. For instance, engine application requires coating on fasteners that can withstand harsh environmental conditions at elevated temperature.

Based on the process type, the spray coating process dominates the market and is projected to maintain its dominance during the forecast period as well. The process has great dispersion with the coating materials, which enables the application of a very thin but tough coating layer. Electroplating, another considerable segment, is likely to depict a good growth in the market during the same period. Some other key processes include dip coating and spin coating.

Based on region, North America is projected to remain the largest market during the forecast period. The region is the manufacturing capital of the aerospace industry with the presence of several large- to small-sized OEMs, tier players, distributors, fastener

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manufacturers, and airline companies. 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, Lockheed Martin, and Gulfstream.

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. Major Asian economies, such as China, India, and South Korea, have incessantly been raising their defense budget in order to advance their defense capabilities. This trend is impacting the demand for fasteners for OE as well as aftermarket.

The supply chain of this market comprises raw material suppliers, fastener coating suppliers, fastener manufacturers, distributors, component manufacturers, aircraft OEMs, airline companies, leasing companies, and MRO companies. Some of the key companies in the market include Arconic Corporation, Curtiss-Wright Corporation (E/M Coating Services), Endura Coatings LLC, Innovative Coatings Technology Corp. (INCOTEC), Lisi Aerospace, PPG Aerospace, Precision Castparts Corporation, and TIODIZE Co., Inc.

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 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

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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 fastener coatings market is segmented into the following categories:

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)
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)
By Application Type

Engine (Regional Analysis: North America, Europe, Asia-Pacific, and RoW)
Aerostructures (Regional Analysis: North America, Europe, Asia-Pacific, and RoW)
Interiors (Regional Analysis: North America, Europe, Asia-Pacific, and RoW)
Others (Regional Analysis: North America, Europe, Asia-Pacific, and RoW)
By Coating Type

Cadmium Coating (Regional Analysis: North America, Europe, Asia-Pacific, and RoW)
Dry Lubricant (Regional Analysis: North America, Europe, Asia-Pacific, and RoW)
Silver Coating (Regional Analysis: North America, Europe, Asia-Pacific, and RoW)
Aluminum Coating (Regional Analysis: North America, Europe, Asia-Pacific, and RoW)
Others (Regional Analysis: North America, Europe, Asia-Pacific, and RoW)
By Process Type

Spray Coating (Regional Analysis: North America, Europe, Asia-Pacific, and RoW)
Dip Coating (Regional Analysis: North America, Europe, Asia-Pacific, and RoW)

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

Current market segmentation of any one of the application types by coating 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

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