

Aircraft Nacelle Systems Market by Aircraft Type (Narrow-Body Aircraft, Wide-Body Aircraft, Very Large Aircraft, Regional Aircraft, Business Jet, and Military Aircraft), by Engine Type (Turbofan Engine, Turboprop Engine and Turbojet Engine), by Material Type (Composites, Nickel Alloy, Titanium, and Others), by Process Type (Hand Layup, Resin Infusion, AFP/ATL, Forming, and Others) and by Region (North America, Europe, Asia-Pacific, and Rest of the World), Trend, Forecast, Competitive Analysis, and Growth Opportunity: 2018-2023

<https://marketpublishers.com/r/A673A701917EN.html>

Date: April 2018

Pages: 259

Price: US\$ 4,790.00 (Single User License)

ID: A673A701917EN

Abstracts

This is the ONGOING report. If ordered it could be delivered in 2-3 weeks timeframe.

This report, from Stratview Research, studies the global aircraft nacelle systems 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 Aircraft Nacelle Systems Market: Highlights

The global aircraft nacelle systems market is projected to reach an estimated value of US\$ 9.8 billion in 2023. The upward trajectory of the aircraft nacelle systems market is expected to continue with vigorous growth opportunities across regions for both existing

as well as new players. The biggest factor mushrooming the market for aircraft nacelle systems is an organic growth in aircraft deliveries. 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 nacelle systems globally in the foreseeable future.

In addition to that, Boeing and Airbus had a combined total order backlog of 13,219 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.

Airlines' requirement of fuel-efficient aircraft is also leaving a significant imprint on the aircraft nacelle systems market. Most of the nacelle integrators are closely working with the OEMs and other industry stakeholders in order to develop lightweight nacelles with enhanced performance. This is another factor driving the demand for advanced lightweight nacelle systems.

Another trend stimulating the design of nacelle and its demand is an incessant increase in the diameter of engine fan blades. Major next-generation commercial aircraft are coming with large-sized engine fan blades in order to generate a higher thrust. They are increasingly making engine fan blades for their next-generation aircraft with advanced composites. Nacelle integrators along with OEMs are developing large-sized nacelles to easily accommodate such large-sized fan blades.

The global aircraft nacelle systems market is segmented based on the aircraft type as Narrow-Body Aircraft, Wide-Body Aircraft, Very Large Aircraft, Regional Aircraft, Business Jet, and Military Aircraft. Narrow-body aircraft is expected to remain the growth engine of the global aircraft nacelle systems market during the forecast period, propelled by the introduction of fuel-efficient variants of best-selling programs (A320neo and B737 Max). Both commercial aircraft airframers (Boeing and Airbus) are enjoying huge order backlogs of their key aircraft programs and are increasing the production

rates of A320 and B737 to meet the growing demand.

Based on the material type, the aircraft nacelle systems market is segmented as Composites, Nickel Alloys, Titanium, and Others. Composite is expected to remain the material of choice in the aircraft nacelle systems market during the forecast period. There has been an incessant replacement of metals with composite components, owing to their excellent strength-to-weight ratio at a relatively low weight. Titanium material is expected to witness the highest growth in the market during the same period, driven by an increasing penetration, especially in exhaust components.

Based on the regions, North America is expected to remain the largest aircraft nacelle systems market during the forecast period, whereas Asia-Pacific is expected to experience the highest growth during the same period. The highest growth of aircraft nacelle systems in Asia-Pacific is mainly attributable to the increasing aircraft fleet to support rising passenger traffic; the opening of assembly plants of Boeing and Airbus of B737, A320, and A330 aircraft programs; increasing procurement of military aircraft, owing to rising defense budget; and upcoming indigenous commercial and regional aircraft (C919 and MRJ).

The supply chain of this market comprises raw material suppliers, nacelle component manufacturers, nacelle integrators, engine OEMs, aircraft OEMs, and airline companies. The key aircraft nacelle system manufacturers are UTC Aerospace Systems, Safran S.A., Spirit AeroSystems, Inc., GE Aviation, GKN Aerospace, Bombardier (Short Brother PLC), and Leonardo S.p.A. Development of lighter nacelle systems, regional expansion, and mergers & acquisitions are the key strategies adopted by the major players to gain a 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 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. 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 global aircraft nacelle systems market is segmented into the following categories.

Global Aircraft Nacelle Systems Market, By Aircraft Type

Narrow-Body Aircraft (Regional Analysis: North America, Europe, Asia-Pacific, and Rest of the World)

Wide-Body Aircraft (Regional Analysis: North America, Europe, Asia-Pacific, and Rest of the World)

Very Large Aircraft (Regional Analysis: North America, Europe, Asia-Pacific, and Rest of the World)

Regional Aircraft (Regional Analysis: North America, Europe, Asia-Pacific, and Rest of the World)

Business Jet (Regional Analysis: North America, Europe, Asia-Pacific, and Rest of the World)

Military Aircraft (Regional Analysis: North America, Europe, Asia-Pacific, and Rest of the World)

Global Aircraft Nacelle Systems Market, By Engine Type

Turbofan Engine (Regional Analysis: North America, Europe, Asia-Pacific, and Rest of the World)

Turboprop Engine (Regional Analysis: North America, Europe, Asia-Pacific, and Rest of the World)

Turbojet Engine (Regional Analysis: North America, Europe, Asia-Pacific, and Rest of the World)

Global Aircraft Nacelle Systems Market, By Material Type

Composites (Regional Analysis: North America, Europe, Asia-Pacific, and Rest of the World)

Nickel Alloy (Regional Analysis: North America, Europe, Asia-Pacific, and Rest of the World)

Titanium (Regional Analysis: North America, Europe, Asia-Pacific, and Rest of the World)

Other Metals (Regional Analysis: North America, Europe, Asia-Pacific, and Rest of the World)

Global Aircraft Nacelle Systems Market, By Manufacturing Process Type

Hand Layup (Regional Analysis: North America, Europe, Asia-Pacific, and Rest of the World)

Resin Infusion (Regional Analysis: North America, Europe, Asia-Pacific, and Rest of the World)

AFP/ATL (Regional Analysis: North America, Europe, Asia-Pacific, and Rest of the World)

Forming (Regional Analysis: North America, Europe, Asia-Pacific, and Rest of the World)

Others (Regional Analysis: North America, Europe, Asia-Pacific, and Rest of the World)

Global Aircraft Nacelle Systems Market, By Region

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

Europe (Country Analysis: Germany, France, 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)

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