

# **The Commercial Aircraft Modernisation, Upgrade & Retrofit Market 2013-2023**

<https://marketpublishers.com/r/CF5E63C1B31EN.html>

Date: October 2013

Pages: 137

Price: US\$ 2,633.00 (Single User License)

ID: CF5E63C1B31EN

## **Abstracts**

The world commercial aircraft modernisation, Upgrade & Retrofit market is in a healthy state and projected to expand as airlines take on new orders. At the moment the market is being driven by a combination of factors. This includes the number of aircraft which are currently operational, the number of active aircraft due to undertake heavy maintenance MRO checks, fuel and cost savings from introducing light weight materials, demand for air cargo, flight regulations and a need by airlines (in particular operators of wide body aircraft) for brand recognition. Visiongain has determined that the value of the world commercial aircraft modernisation, Upgrade & Retrofit market in 2013 will reach \$9.32bn.

### **What makes this report unique?**

Visiongain consulted widely with industry experts and one the full transcript from one of these exclusive interviews is included in the report from TAECO (part of HAECO). As such, our reports have a unique blend of primary and secondary sources providing informed opinion. This approach allows insight into the key drivers and restraints behind contract and programme developments, as well as identifying the leading companies. The report also presents a unique blend of qualitative analysis combined with extensive quantitative data including global, submarket and regional markets forecasts from 2013-2023 - all highlighting strategic business opportunities.

### **Why you should buy The Commercial Aircraft Modernisation, Upgrade & Retrofit Market 2013-2023**

We guarantee you will receive the following information

137 pages of comprehensive analysis

An exclusive visiongain interview from a leading industry expert informing the analysis

Peter Murton TAECO (part of HAECO)

102 tables, charts, and graphs

World Commercial Aircraft Modernisation, Upgrade & Retrofit Market 2013-2023 market forecasts

3 Commercial Aircraft Modernisation, Upgrade & Retrofit submarket forecasts from 2013-2023

Avionics

Cabin Interior and IFE

Airframe

6 regional Commercial Aircraft Modernisation, Upgrade & Retrofit Market Forecasts between 2013-2023

North America

Europe

Asia Pacific

Middle East

South America

Africa

Detailed tables of significant Commercial Aircraft Modernisation, Upgrade & Retrofit contracts, projects & programmes for each region

A SWOT analysis of the Commercial Aircraft Modernisation, Upgrade & Retrofit market

Profiles of 27 leading companies involved with the Commercial Aircraft Modernisation, Upgrade & Retrofit market

AAR

Ameco Beijing

AmSafe

Astronics Corporation

Aviation Partners Boeing

Diehl Aerosystems Overview

EMTEQ

FACC AG

Fokker Technologies

Global AirWorks

HAECO

Honeywell

Israel Aerospace Industries (IAI)

L-3 Communications

Lufthansa Technik

Moog Inc.

PGA Electronic

Regent Aerospace

Rockwell Collins

Sabena Technics

SIAEC

ST Aerospace

Thales Group

TIMCO Aerosystems

Universal Avionics Systems Corporation

Yokohama Rubber Company (YRC)

Zodiac Aerospace

### **You can order this report today**

Gain an understanding of how to tap into the full potential of this market by ordering The Commercial Aircraft Modernisation, Upgrade & Retrofit Market 2013-2023. Don't miss out on this critical industry report. Don't delay. Order now.

## Contents

### **1. EXECUTIVE SUMMARY**

- 1.1 World Commercial Aircraft Modernisation, Upgrade & Retrofit Market Overview
- 1.2 Benefits of This Report
- 1.3 Who is This Report For?
- 1.4 Methodology
- 1.5 World Commercial Aircraft Modernisation, Upgrade & Retrofit Market Forecast 2013-2023
- 1.6 World Commercial Aircraft Modernisation, Upgrade & Retrofit Submarket Forecasts 2013-2023
- 1.7 World Commercial Aircraft Modernisation, Upgrade & Retrofit Regional Market Forecasts 2013-2023

### **2. INTRODUCTION TO THE WORLD COMMERCIAL AIRCRAFT MODERNISATION, UPGRADE & RETROFIT MARKET**

- 2.1 World Commercial Aircraft Modernisation, Upgrade & Retrofit Market Structure Overview
- 2.2 World Commercial Aircraft Modernisation, Upgrade & Retrofit Market Definition
- 2.3 An Insight into Some of the Main Factors which will Affect the Commercial Aircraft Modernisation, Upgrade & Retrofit Market
- 2.4 Interesting Developments to Look Out for

### **3. WORLD COMMERCIAL AIRCRAFT MODERNISATION, UPGRADE & RETROFIT MARKET FORECAST 2013-2023**

- 3.1 World Commercial Aircraft Modernisation, Upgrade & Retrofit Market
- 3.2 Drivers & Restraints in the World Commercial Aircraft Modernisation, Upgrade & Retrofit Market

### **4. WORLD COMMERCIAL AIRCRAFT MODERNISATION, UPGRADE & RETROFIT SUBMARKET FORECASTS 2013-2023**

- 4.1 World Commercial Aircraft Modernisation, Upgrade & Retrofit Submarket Overview 2013-2023
- 4.2 World Commercial Aircraft Modernisation, Upgrade & Retrofit Avionics Submarket
  - 4.2.1 Aircraft will need to Comply with New Flying Regulations making it Inevitable that

Spending will occur in the Avionics Submarket

4.3 World Commercial Aircraft Modernisation, Upgrade & Retrofit Cabin Interiors and IFE Submarket Forecast

4.3.1 It is all about Improving the Passenger Experience for the Cabin Interiors Submarket

4.4 World Commercial Aircraft Modernisation, Upgrade & Retrofit Airframe Submarket Forecast

4.4.1 Narrow Body Conversions will be Crucial to the Fortunes of the Airframe Submarket

## **5. WORLD COMMERCIAL AIRCRAFT MODERNISATION, UPGRADE & RETROFIT REGIONAL MARKETS FORECAST 2013-2023**

5.1 World Commercial Aircraft Modernisation, Upgrade & Retrofit Regional Markets Share Forecast 2013-2023

5.2 North American Commercial Aircraft Modernisation, Upgrade & Retrofit Market Forecast 2013-2023

5.2.1 North American Commercial Aircraft Modernisation, Upgrade & Retrofit Market Drivers & Restraints

5.2.2 Fleet Renewals in North America make for Bad Reading but there are still Countless Opportunities for MRO Providers

5.3 European Commercial Aircraft Modernisation, Upgrade & Retrofit Market Forecast 2013-2023

5.3.1 European Commercial Aircraft Modernisation, Upgrade & Retrofit Market Drivers & Restraints

5.3.2 Frequent Maintenance Checks by Many Airlines mean that it's not All Bad News

5.4 Asia Pacific Commercial Aircraft Modernisation, Upgrade & Retrofit Market 2013-2023

5.4.1 Asia Pacific Commercial Aircraft Modernisation Market Drivers & Restraints

5.4.2 Can the Asian Market Handle all the Demand for Modernisation, Upgrade & Retrofit Programmes?

5.5 Middle Eastern Commercial Aircraft Modernisation, Upgrade & Retrofit

5.5.1 Middle Eastern Commercial Aircraft Modernisation, Upgrade & Retrofit Market Drivers & Restraints

5.5.2 Why there are Encouraging signs in the Middle Eastern Market

5.6 South American Commercial Aircraft Modernisation, Upgrade & Retrofit Market Forecast 2013-2023

5.6.1 South American Commercial Aircraft Modernisation, Upgrade & Retrofit Market Drivers & Restraints

5.6.2 South America has Enormous Potential as a Market but Regulation is Still a Problem

5.7 African Commercial Aircraft Modernisation, Upgrade & Retrofit Market 2013-2023

5.7.1 African Commercial Aircraft Modernisation, Upgrade & Retrofit Market Drivers & Restraints

5.7.2 Longer Term Growth Prospects in the African Region are Good

## **6. SWOT ANALYSIS OF THE WORLD COMMERCIAL AIRCRAFT MODERNISATION, UPGRADE & RETROFIT MARKET 2013-2023**

### **6.1 Strengths**

6.1.1 New Aircraft, New Opportunities

6.1.2 Fleet Standardisation Counts

6.1.3 Business Traveller Numbers will Grow

6.1.4 Rising Fuel Prices Drive Demand for Lightweight Aircraft

### **6.2 Weaknesses**

6.2.1 It's all about the Economy!

6.2.2 Early Retirements won't be Good for Anyone

### **6.3 Opportunities**

6.3.1 Restructuring of Business Models

6.3.2 New Regulations, New Opportunities

### **6.4 Threats**

6.4.1 Competition from OEMs will make it Difficult for Small Independent Provider

6.4.2 Out of Service Downtime

6.4.3 Fleet Upgrades Don't make for Good News

## **7. EXPERT OPINION**

7.1 Peter Murton -TAECO (part of HAECO)

7.2 HAECO's Recent Involvement in Commercial Aircraft Modernisation, Upgrade & Retrofit

7.3 Technological Developments to Look Out For

7.4 Key Trends and Developments within the Commercial Aircraft Modernisation, Upgrade & Retrofit

7.5 Where does HAECO See Growth?

## **8. LEADING COMPANIES IN THE WORLD COMMERCIAL AIRCRAFT MODERNISATION, UPGRADE & RETROFIT MARKET**

## 8.1 AAR Overview

8.1.1 AAR - One of the Largest Independent MRO providers in North America

## 8.2 Ameco Beijing Overview

8.2.1 China's Largest Aviation Maintenance Supplier is Ameco Beijing

## 8.3 Astronics Corporation Overview

8.3.1 Astronics Corporation acquires PECO Inc.

## 8.4 Aviation Partners Boeing Overview

8.4.1 Aviation Partners Boeing and the Winglet

## 8.5 Israel Aerospace Industries (IAI) Overview

8.5.1 Why IAI/Bedek Aviation Group is one of the Leading Companies in the Airframe Submarket

## 8.6 Diehl Aerosystems Overview

8.6.1 First Tier Supplier Diehl Aerosystems to offer Comprehensive Retrofit Solutions for Aircraft

## 8.7 EMTEQ Overview

8.7.1 EMTEQ - A Specialist in Avionics and Cabin Interiors

## 8.8 FACC AG Overview

8.8.1 FACC AG - From Structural Components to Cabin Interiors

## 8.9 Fokker Technologies Overview

8.9.1 A New Governance Structure for Fokker Technologies

## 8.10 HAECO Overview

8.10.1 HAECO Expands, Sees Strong Demand for Cabin Modifications

## 8.11 Lufthansa Technik Overview

8.11.1 Lufthansa Technik Analysis

8.11.2 Structural Changes Planned at Lufthansa Technik

## 8.12 Sabena technics Overview

8.12.1 An Analysis of Sabena technics

## 8.13 SIAEC Overview

8.13.1 SIAEC - The Dominant MRO Provider in Singapore

## 8.14 ST Aerospace Overview

8.14.1 ST Aerospace Adds New Hangar Space to Meet Growing Demand

## 8.15 Thales Group Overview

8.15.1 Thales Group Continues to Play a Leading Role in IFEC Technologies

## 8.16 TIMCO Aerosystems Overview

8.16.1 TIMCO Aerosystems - Growing into the Cabin Interiors Submarket

## 8.17 Universal Avionics Systems Corporation Overview

8.17.1 Leading Avionics Retrofit Provider Universal Avionics Systems Corporation

## 8.18 Yokohama Rubber Company (YRC) Overview

8.18.1 An Analysis of Yokohama Rubber Company (YRC) Analysis

## 8.19 Zodiac Aerospace Overview

8.19.1 A Good Year for Zodiac Aerospace, the Company plans to Restructure its Cabin Interiors Segment

## 8.20 Other Notable Companies in the World Commercial Aircraft Modernisation, Upgrade & Retrofit Market

8.20.1 AmSafe

8.20.2 Global AirWorks

8.20.3 Honeywell

8.20.4 L-3 Communications

8.20.5 Moog Inc.

8.20.6 PGA Electronic

8.20.7 Regent Aerospace

8.20.8 Rockwell Collins

## 9. CONCLUSIONS

9.1 World Commercial Aircraft Modernisation, Upgrade & Retrofit Market Outlook

9.2 World Commercial Aircraft Modernisation, Upgrade & Retrofit Market Drivers & Restraints

9.3 World Commercial Aircraft Modernisation, Upgrade & Retrofit Market Forecast 2013-2023

9.4 World Commercial Aircraft Modernisation, Upgrade & Retrofit Submarket Forecasts 2013-2023

9.5 Regional Commercial Aircraft Modernisation, Upgrade & Retrofit Market Forecasts 2013-2023

## 10. GLOSSARY

## List Of Tables

### LIST OF TABLES

Table 1.1 World Commercial Aircraft Modernisation, Upgrade & Retrofit Market Forecast Summary 2013, 2018, 2023 (\$bn, CAGR %)

Table 1.2 World Commercial Aircraft Modernisation, Upgrade & Retrofit Submarket Forecasts Summary 2013, 2018, 2023 (\$bn, CAGR %)

Table 1.3 World Commercial Aircraft Modernisation, Upgrade & Retrofit Regional Market Forecasts Summary 2013, 2018, 2023 (\$bn, CAGR %)

Table 3.1 World Commercial Aircraft Modernisation, Upgrade & Retrofit Market Forecast 2013-2023 (\$bn, AGR %, CAGR%, Cumulative)

Table 3.2 World Commercial Aircraft Modernisation, Upgrade & Retrofit Market Drivers & Restraints

Table 4.1 World Commercial Aircraft Modernisation, Upgrade & Retrofit Submarket Forecasts 2013-2023 (\$bn, AGR %)

Table 4.2 World Commercial Aircraft Modernisation, Upgrade & Retrofit Avionics Submarket Forecast 2013-2023 (\$bn, AGR %, CAGR%)

Table 4.3 World Commercial Aircraft Modernisation, Upgrade & Retrofit Cabin Interiors and IFE Submarket Forecast 2013-2023 (\$bn, AGR %, CAGR%)

Table 4.4 World Commercial Aircraft Modernisation, Upgrade & Retrofit Airframe Submarket Forecast 2013-2023 (\$bn, AGR %, CAGR%)

Table 5.1 World Commercial Aircraft Modernisation, Upgrade & Retrofit Regional Markets Forecast 2013-2023 (\$bn, AGR %)

Table 5.2 North American Commercial Aircraft Modernisation, Upgrade & Retrofit Market Forecast 2013-2023 (\$bn, AGR %, CAGR%)

Table 5.3 North American Commercial Aircraft Modernisation, Upgrade & Retrofit Market Drivers & Restraints

Table 5.4 North American Commercial Aircraft Modernisation, Upgrade & Retrofit Market Major Contracts/Programmes (Company, Date, Details)

Table 5.5 European Commercial Aircraft Modernisation, Upgrade & Retrofit Market Forecast 2013-2023 (\$bn, AGR %, CAGR%)

Table 5.6 European Commercial Aircraft Modernisation, Upgrade & Retrofit Market Drivers & Restraints

Table 5.7 European Commercial Aircraft Modernisation, Upgrade & Retrofit Market Major Contracts/Programmes (Company, Date, Details)

Table 5.8 Asia Pacific Commercial Aircraft Modernisation, Upgrade & Retrofit Market Forecast 2013-2023 (\$bn, AGR %, CAGR%)

Table 5.9 Asia Pacific Commercial Aircraft Modernisation, Upgrade & Retrofit Market

## Drivers & Restraints

Table 5.10 Asia Pacific Commercial Aircraft Modernisation, Upgrade & Retrofit Market Major Contracts/Programmes (Company, Date, Details)

Table 5.11 Middle Eastern Commercial Aircraft Modernisation, Upgrade & Retrofit Market Forecast 2013-2023 (\$bn, AGR %, CAGR%)

Table 5.12 Middle East Commercial Aircraft Modernisation, Upgrade & Retrofit Market Drivers & Restraints

Table 5.13 Middle Eastern Commercial Aircraft Modernisation, Upgrade & Retrofit Market Major Contracts/Programmes (Company, Date, Details)

Table 5.14 South American Commercial Aircraft Modernisation, Upgrade & Retrofit Market Forecast 2013-2023 (\$bn, AGR %, CAGR%)

Table 5.15 South American Commercial Aircraft Modernisation, Upgrade & Retrofit Market Drivers & Restraints

Table 5.16 South American Commercial Aircraft Modernisation, Upgrade & Retrofit Market Major Contracts/Programmes (Company, Date, Details)

Table 5.17 African Commercial Aircraft Modernisation, Upgrade & Retrofit Market Forecast 2013-2023 (\$bn, AGR %, CAGR%)

Table 5.18 African Commercial Aircraft Modernisation, Upgrade & Retrofit Market Drivers & Restraints

Table 5.19 African Commercial Aircraft Modernisation, Upgrade & Retrofit Market Major Contracts/Programmes (Company, Date, Details)

Table 6.1 SWOT Analysis of the World Commercial Aircraft Modernisation, Upgrade & Retrofit Market 2013-2023

Table 8.1 AAR Overview 2012 (Total Revenue, Revenue from MRO Segment, HQ, Ticker, Contact, Website)

Table 8.2 AAR Products / Services (Product, Specification)

Table 8.3 Ameco Beijing Overview 2012 (HQ, Website)

Table 8.4 Ameco Beijing Products / Services (Product, Specification)

Table 8.5 Astronics Corporation Overview 2012 (Total company sales, % Revenue From Commercial Transport, HQ, Ticker, Contact, Website)

Table 8.6 Astronics Corporation Products / Services (Product, Specification)

Table 8.7 Aviation Partners Boeing Overview 2012 (HQ, Ticker, Website)

Table 8.8 Aviation Partners Boeing Products / Services (Product, Specification)

Table 8.9 IAI Overview 2012 (Total Sales, HQ, Ticker, Website)

Table 8.10 IAI Products / Services (Division, Product)

Table 8.11 Diehl Aerosystems Overview 2012 (Total Revenue, Revenue from Market, HQ, Ticker, Contact, Website)

Table 8.12 Diehl Aeroystems Products / Services (Product, Specification)

Table 8.13 EMTEQ Overview 2012 (HQ, Website)

Table 8.14 EMTEQ Products / Services (Division, Product, Specification)
Table 8.15 FACC AG Overview 2012 (HQ, Website)
Table 8.16 FACC AG Products / Services (Division, Product)
Table 8.17 Fokker Technologies Overview 2012 (Total Revenue, HQ, Ticker, Contact, Website)
Table 8.18 Fokker Technologies Products / Services (Division, Product, Specification)
Table 8.19 HAECO Overview 2012 (HQ, Ticker, Website)
Table 8.20 HAECO Products / Services (Product, Specification)
Table 8.21 Lufthansa Technik Overview 2012 (Total Revenue, HQ, Ticker, Contact, Website)
Table 8.22 Lufthansa Technik Products / Services (Product, Specification)
Table 8.23 Sabena technics Overview 2012 (Total Revenue, HQ, Website)
Table 8.24 Sabena technics Products / Services (Product, Specification)
Table 8.25 SIAEC Overview 2012 (Total Revenue, HQ, Ticker, Contact, Website)
Table 8.26 SIAEC Products / Services (Product, Specification)
Table 8.27 ST Aerospace Overview 2012 (Total Revenue, HQ, Ticker, Contact, Website)
Table 8.28 ST Aerospace Products / Services (Product, Specification)
Table 8.29 ST Aerospace Subsidiaries and Services for Modifications and Upgrades
Table 8.30 Thales Group Overview 2012 (Total Revenue, Revenue from Market, % Revenue From Market, Global Market Share %, HQ, Ticker, Contact, Website)
Table 8.31 Thales Group Products / Services (Division, Product, Specification)
Table 8.32 TIMCO Aerosystems Overview 2012 (HQ, Website)
Table 8.33 TIMCO Aerosystems Products / Services (Product, Specification)
Table 8.34 Universal Avionics Systems Corporation Overview 2012 (HQ, Contact, Website)
Table 8.35 Universal Avionics Systems Corporation Products
Table 8.36 YRC Overview 2012 (Total Revenue, Revenue from Other Products, HQ, Website)
Table 8.37 YRC Products / Services (Division, Product)
Table 8.38 Zodiac Aerospace Overview 2012 (Total Revenue, HQ, Ticker, Website)
Table 8.39 Zodiac Aerospace Products / Services (Product, Specification)
Table 8.40 Other Leading Companies in the Market 2013 (Company, Product /service)
Table 9.1 World Commercial Aircraft Modernisation, Upgrade & Retrofit Market Drivers & Restraints
Table 9.2 World Commercial Aircraft Modernisation, Upgrade & Retrofit Market Forecast Summary 2013, 2018, 2023 (\$bn, CAGR %)
Table 9.3 World Commercial Aircraft Modernisation, Upgrade & Retrofit Submarket Forecasts Summary 2013, 2018, 2023 (\$bn, CAGR %)

Table 9.4 Regional Commercial Aircraft Modernisation, Upgrade & Retrofit Regional  
Market Forecasts Summary 2013, 2018, 2023 (\$bn, CAGR %)

## About

### Expert Opinion

#### **Peter Murton - TAECO (part of HAECO)**

Peter Murton is the Vice President of Commercial, Cabin Completion Centre, Taikoo (Xiamen) Aircraft Engineering Co. Ltd. (TAECO). TAECO is a subsidiary of the HAECO Group, one of the world's leading aeronautical engineering groups. Peter Murton kindly provided answers to Visiongain's questions in September 2013.

#### **HAECO's Recent Involvement in Commercial Aircraft Modernisation, Upgrade & Retrofit**

**Visiongain:** Could you outline HAECO's recent involvement in commercial aircraft modernization, Upgrade & Retrofit?

**Peter Murton:** The HAECO Group has many years of experience in the refurbishment, modification and reconfiguration of commercial aircraft cabins as an installation provider at its two main MRO locations in Hong Kong and Xiamen, mainland China. The HAECO Group has built up an excellent reputation in this area, having modified or reconfigured over 250 aircraft cabins, which probably ranks us as a top player worldwide for top tier airlines from the USA, Europe and the Asia Pacific. Our technical experience and operational efficiency has also made us a preferred installation partner of the major cabin integration houses.

The HAECO Group has also developed capabilities that complement its strength in the traditional MRO arena with higher value services such as Inventory Technical Management (ITM) and Fleet Technical Management (FTM). Furthermore, the HAECO Group now has cabin engineering design talents spread across three locations; Hong Kong, Xiamen in mainland China and San Antonio in the US operating under the brand of HAECO Cabin Solutions, in order to complement its VIP cabin completion services. The Group now holds design approvals from the HKCAD and CAAC, and has set up a certification house in San Antonio specifically to handle FAA certification projects.

The HAECO Group is currently undertaking its first turnkey cabin project encompassing programme management, engineering design, vendor management, certification and installation for the complete green cabin completion of 3 x 767-300s that will be

delivered straight from Boeing to the HAECO Group's TAEKO facility in Xiamen. The aircraft will have a two class cabin with lieflat business class seats and economy seats, complete with in-seat IFE. The HAECO Group is obtaining an FAA STC and concurrent EASA STC for this project.

## I would like to order

Product name: The Commercial Aircraft Modernisation, Upgrade & Retrofit Market 2013-2023

Product link: <https://marketpublishers.com/r/CF5E63C1B31EN.html>

Price: US\$ 2,633.00 (Single User License / Electronic Delivery)

If you want to order Corporate License or Hard Copy, please, contact our Customer Service:

[info@marketpublishers.com](mailto:info@marketpublishers.com)

## Payment

To pay by Credit Card (Visa, MasterCard, American Express, PayPal), please, click button on product page <https://marketpublishers.com/r/CF5E63C1B31EN.html>

To pay by Wire Transfer, please, fill in your contact details in the form below:

First name:  
Last name:  
Email:  
Company:  
Address:  
City:  
Zip code:  
Country:  
Tel:  
Fax:  
Your message:

**\*\*All fields are required**

Customer signature \_\_\_\_\_

Please, note that by ordering from marketpublishers.com you are agreeing to our Terms & Conditions at <https://marketpublishers.com/docs/terms.html>

To place an order via fax simply print this form, fill in the information below and fax the completed form to +44 20 7900 3970