Aircraft Control Surfaces - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts 2019 - 2029

Market Report | 2024-02-17 | 110 pages | Mordor Intelligence

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Report description:

The Aircraft Control Surfaces Market is valued at USD 3.67 billion in 2024 and is forecasted to reach USD 5.15 billion by 2029, growing at a CAGR of 7.02% during the forecast period.

Growing orders for new aircraft are the primary growth driver for the market. The procurements of new aircraft may generate demand for aircraft parts and components, like the control surfaces, during the forecast period.

Innovations in aircraft designs gave rise to technologies like dual-purpose flight control surfaces. The growing research in non-conventional aircraft designs is expected to generate new opportunities for the market in the coming years. The high price of advanced aircraft management systems is a market restraint for low-budget air carriers on the global market. Consistent adherence between public authorities and aviation agencies to installing adequate safety and control systems is expected to contribute significantly to the growth in the global aircraft control surfaces market over the forecast period.

Aircraft Control Surfaces Market Trends

Commercial Aircraft Segment had the Highest Market Share

The dominant market share of the commercial aircraft segment is primarily attributed to the high number of deliveries of commercial aircraft compared to the military. The cost of control surfaces for general aviation fixed-wing aircraft is less due to the lower average size and average manufacturing costs associated with the control surfaces in general aviation aircraft compared to those of commercial aircraft. The deliveries of commercial aircraft are continually increasing. For instance, Airbus delivered 661* commercial aircraft to 84 customers in 2022 and registered 1,078 gross new orders. Airbus' end December 2022 backlog stood at

7,239 aircraft. The aircraft delivered is 8% higher compared to 2021. Airbus equally won 802 new orders across all programs and market segments, including several high-profile commitments from some of the world's leading carriers.

Similarly, Boeing delivered 480 airplanes and won 774 net new orders after allowing for cancellations in 2022. Moreover, the Boeing Company secured a USD 796 million contract from the US Army Contracting Command supply aircraft. The contract is expected to be concluded by 2027.

Asia-Pacific Region to Witness the Highest CAGR in the Forecast Period

The aircraft control surfaces market is expected to witness high growth in the Asia-Pacific, mainly due to the growth in aircraft procurements in the region. The region is projected to be the fastest-growing market in terms of the shipments of commercial, military, and general aviation aircraft altogether. China is expected to lead the growth of the aircraft control surfaces market in the region, followed by India. The two countries are the fastest-growing aviation markets in the world, coupled with the various aircraft fleet modernization programs. The growing demand for general aviation aircraft in the region is fuelling the growth. Also, the region benefitted from the growing indigenous manufacturing of aircraft, particularly in China and Japan. Aircraft models under development, like the Space Jet M90 and M100, Xian MA700, Comac C919, and CRAIG CR929, are expected to propel the growth in procurements of aircraft components like the control surfaces in the region. For C919, Xi'an Aircraft Company Limited supplies the control surfaces, whereas, for the Space Jet M90, Aerospace Industrial Development Corporation (AIDC) supplies the control surfaces. All these factors are projected to boost the market growth of the region in the future.

Aircraft Control Surfaces Industry Overview

The aircraft control surfaces market is moderately fragmented due to the long-term associations of market players with aircraft OEMs for specific aircraft models. Triumph Group, Inc., Magellan Aerospace Corporation, Strata Manufacturing PJSC, The Boeing Company, and Airbus SE are some of the prominent players in the market. Aircraft manufacturers are welcoming innovations in control surface technologies that weigh less, reduce drag, and increase fuel savings to increase their profitability on the whole. Hence, newer types of control surfaces with different materials and slight design changes are expected to be launched in the years to come. Initiatives like the focused factory initiative from Boeing, which aims at lowering manufacturing costs, improving quality, and increasing delivery efficiencies, are helping the players gain new contracts. For instance, in June 2023, Joby Aviation, Inc. and GKN Aerospace entered a multi-year agreement for the supply of thermoplastic flight control surfaces for Joby aircraft. The flight control surfaces will be comprised of a lightweight thermoplastic structure assembly manufactured using an advanced out-of-autoclave production method. This cutting-edge manufacturing process will enable high-rate production while delivering on the high-performance requirements of Joby's aircraft.

Similarly, in January 2023, DARPA awarded Boeing a contract to build a full-scale demonstration aircraft for the experimental Control of Revolutionary Aircraft with Novel Effectors (CRANE) project. The X-plane relies on active flow control (AFC), or the use of strategically placed actuators and effectors to alter the flow of air on the aircraft's surface to alter aerodynamic performance. These mechanisms replace traditional rudders, ailerons, and flaps. They also reduce drag and weight, generate lift at a high angle of attack, and allow for a change in the thickness of the structure.

Additional Benefits:

- The market estimate (ME) sheet in Excel format
- 3 months of analyst support

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