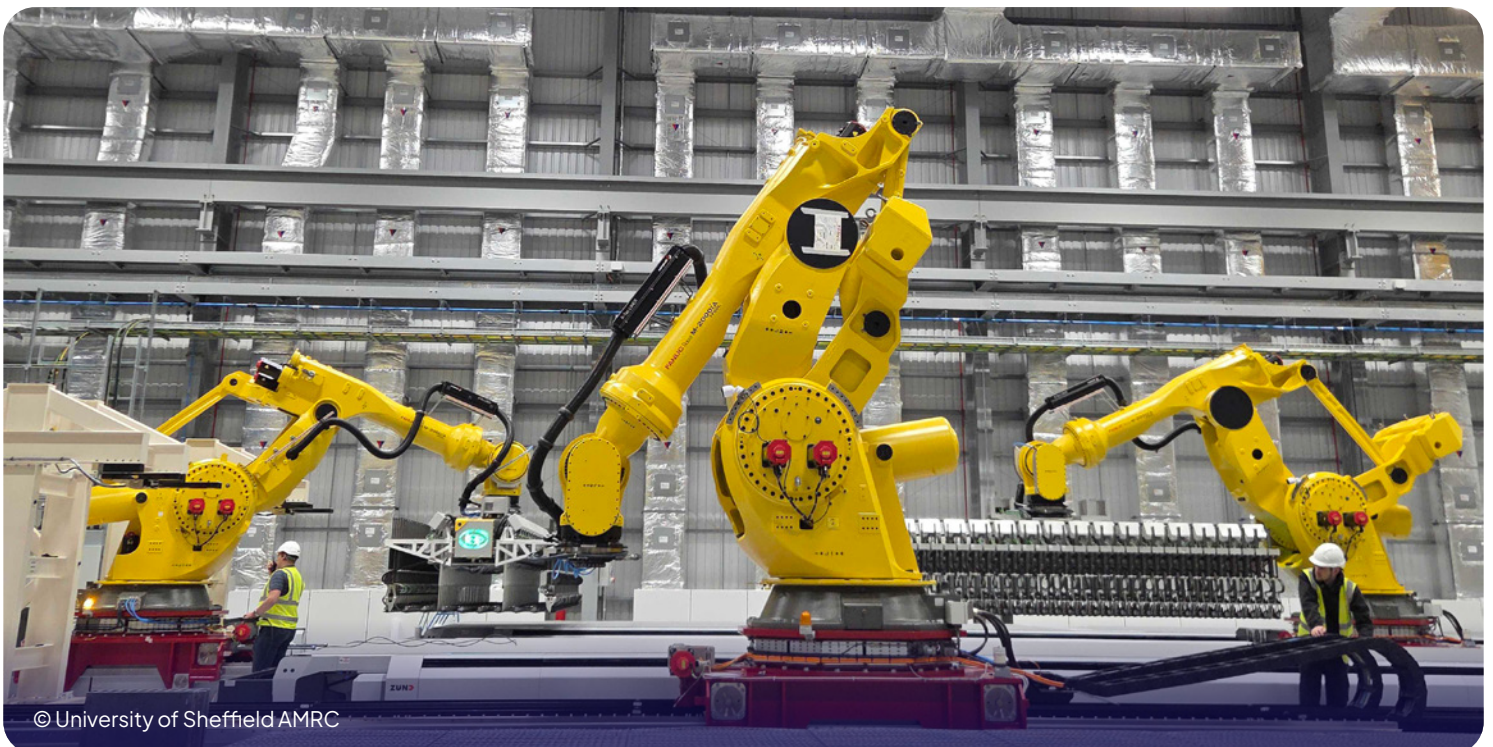


Framework for Growth:

SECURING THE UK'S COMPOSITES ADVANTAGE

July 2026



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The Aerospace Technology Institute (ATI) is an independent not-for-profit organisation working in partnership with the UK government and industry to enhance the competitiveness of the UK aerospace sector through technology leadership and funding. Since 2014, the ATI Programme has invested over £4.2 billion of joint government-industry funding in a balanced portfolio of research and technology projects. The ATI Programme is delivered in partnership with the Department for Business and Trade and Innovate UK.

The ATI would like to acknowledge the valuable contributions of all Composites Working Group member organisations in the development and consolidation of this framework: Advanced Manufacturing Innovation Centre (AMIC), Advanced Propulsion Centre UK (APC UK), Aerospace Growth Partnership (AGP), Airbus, BAE Systems, Boeing, CCP Gransden, Collins Aerospace, Composites UK, DFS Composites, Dowty - A GE Aerospace Company, Electroimpact, GKN Aerospace, Hexcel, iCOMAT, Loop Technology, McLaren Automotive, NCC, Rolls-Royce, Safran, Short Brothers - a Boeing Company, Syensqo, The University of Nottingham, TWI (The Welding Institute), University of Bristol, University of Sheffield AMRC (Advanced Manufacturing Research Centre).

These organisations reflect the breadth and depth of the UK aerospace composites ecosystem. Their diverse and complementary set of perspectives ensured that this framework is grounded in both technical insight and industrial reality. A wider set of organisations and stakeholders have also provided insight and, while it is not possible to acknowledge all contributors individually, their collective input has been instrumental in shaping the direction, scope, and ambition of this work. The ATI is grateful for the time, expertise, and collaborative spirit demonstrated by all contributors, which has been instrumental in shaping a robust, industry-aligned and actionable framework for the future of the UK aerospace composites sector.

EXECUTIVE SUMMARY

- ▶ The UK has a significant opportunity to grow its aerospace composites market from £726 million in 2022 to more than £4.5 billion by 2050, driven by the ramp up in production volumes and next generation single-aisle aircraft programmes.
- ▶ Capturing this opportunity will require more than a world-class materials capability. By 2030, the UK must demonstrate integrated, certifiable and scalable industrial systems that can design, manufacture, qualify and deliver high-value composite products at unprecedented rates.
- ▶ This framework sets out five priority pillars for coordinated sector action: high-rate industrial systems; advanced tooling capability; novel structural concepts; material supply chain resilience; and depth of the manufacturing supply chain.
- ▶ ATI Programme-funded projects have already established a strong foundation, with more than £900 million invested in composite aerostructures, propulsion and systems capabilities that are helping to translate innovation into industrial readiness.
- ▶ The next phase must translate technology development to delivery: aligning government, industry, SMEs, RTOs and academia around ambitious programmes that mature key technologies to TRL6 by 2030 and strengthen UK supply-chain readiness.

This framework positions the UK to secure future aerospace workshare, attract inward investment, deepen domestic supply chains, protect critical sovereign capabilities and build a resilient, globally competitive composites sector through to 2050.

INTRODUCTION

The Aerospace Technology Institute's (ATI) UK aerospace technology strategy Engineering Growth sets out a clear ambition for the UK to double the value of its aerospace sector by 2035 and grow it by more than four times by 2050. The ATI's 2025 Composites Market Spotlight highlights a significant, and growing, opportunity for the UK in advanced aerospace products that enable step-change reductions in fuel burn and emissions.

Now, this paper provides a framework for how lightweight, high-performance fibre-reinforced polymer composite materials and the underlying industrial capabilities required to design, manufacture, qualify and deliver aerospace products at scale will support the delivery of those growth ambitions and the actions that must be taken. It does not directly address ceramic and metal matrix composites, which are considered within other areas of the ATI portfolio.

Competitiveness in this field will not be secured through materials performance alone and the UK must deliver integrated, scalable solutions encompassing design, materials and manufacturing capabilities. By aligning technology

development, supply chain capability and strategic investment, this framework provides a clear pathway for the UK to capture future aerospace opportunities and secure long-term economic growth.

This framework has been developed in close partnership with industry, academia and research organisations through the ATI Composites Working Group. It reflects a shared understanding of challenges, aligned with ongoing and future ATI Programme-funded projects, and provides a coordinated view of where investment and effort should be focused. While the framework mainly focuses on civil aerospace opportunities, it also recognises complementary and overlapping defence needs, shared technology challenges, and the opportunity to maximise dual-use benefits.

STRATEGIC CONTEXT: WHY COMPOSITES MATTER NOW

Composite materials have already transformed the design and manufacture of modern aircraft. The Boeing 787 and Airbus A350 introduced composite primary structures at scale for large civil aircraft, with approximately 50% of the airframe structures manufactured from composite materials. Single-aisle platforms have also increasingly incorporated composite materials, accounting for approximately 46% of the structural weight of a modern Airbus A220, which features a predominantly composite wing designed, certified and manufactured in the UK. Future new Boeing and Airbus single-aisle aircraft, often referred to as next generation single-aisle (NGSA), are likely to further increase the adoption of advanced composites in civil aerospace.

Composites as a % of aircraft structural weight (1980–2040)

Recreated using data from Counterpoint Market Intelligence

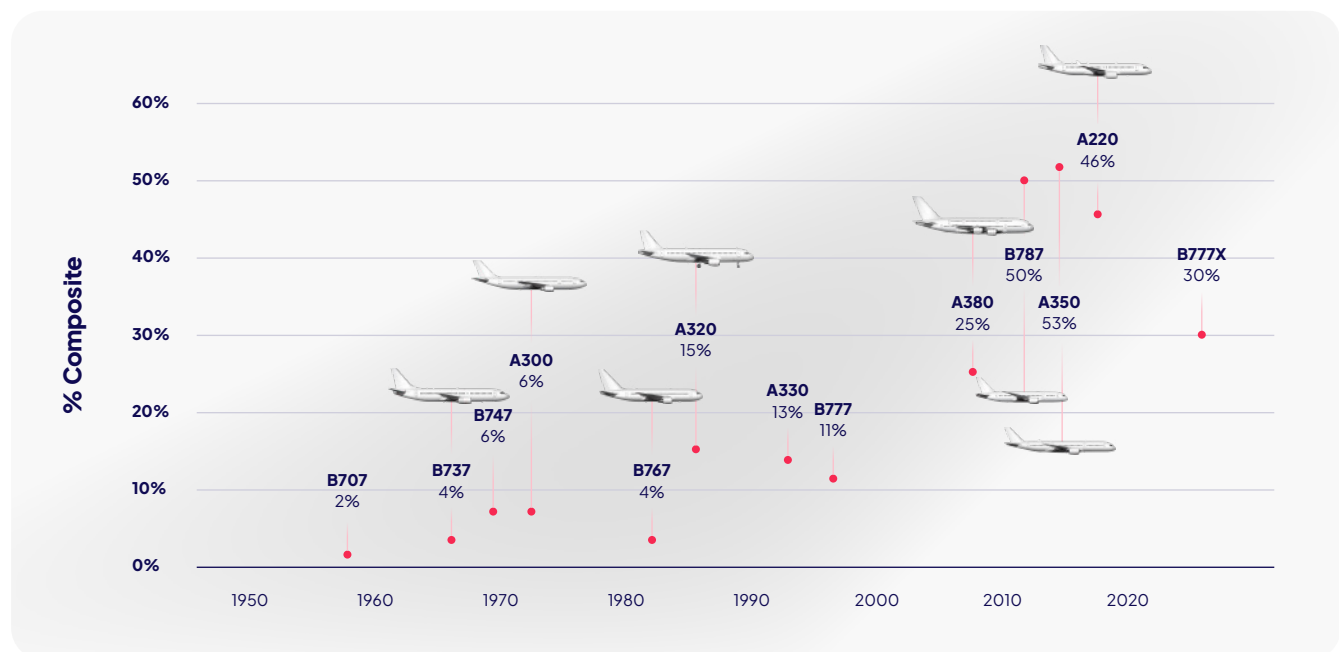


Figure 1 — Composite growth in civil aerospace

Single-aisle aircraft represent about 70% of aircraft deliveries to 2050 and will require unprecedented delivery volumes. This requires substantial transformation in manufacturing systems beyond traditional practices. In this context, the competitiveness of all components will be determined not only by performance, but by whether they can be manufactured at rate, with acceptable cost, quality, facility footprint, energy use and repeatability. To gain a competitive advantage in this growing composite market, the UK needs to deliver integrated, certifiable, high-rate industrial systems that convert design potential into production reality. Demonstrated readiness should align with the ATI's future market scenario in figure 2 that shows indicative new aircraft entry-into-service timelines and future production levels.

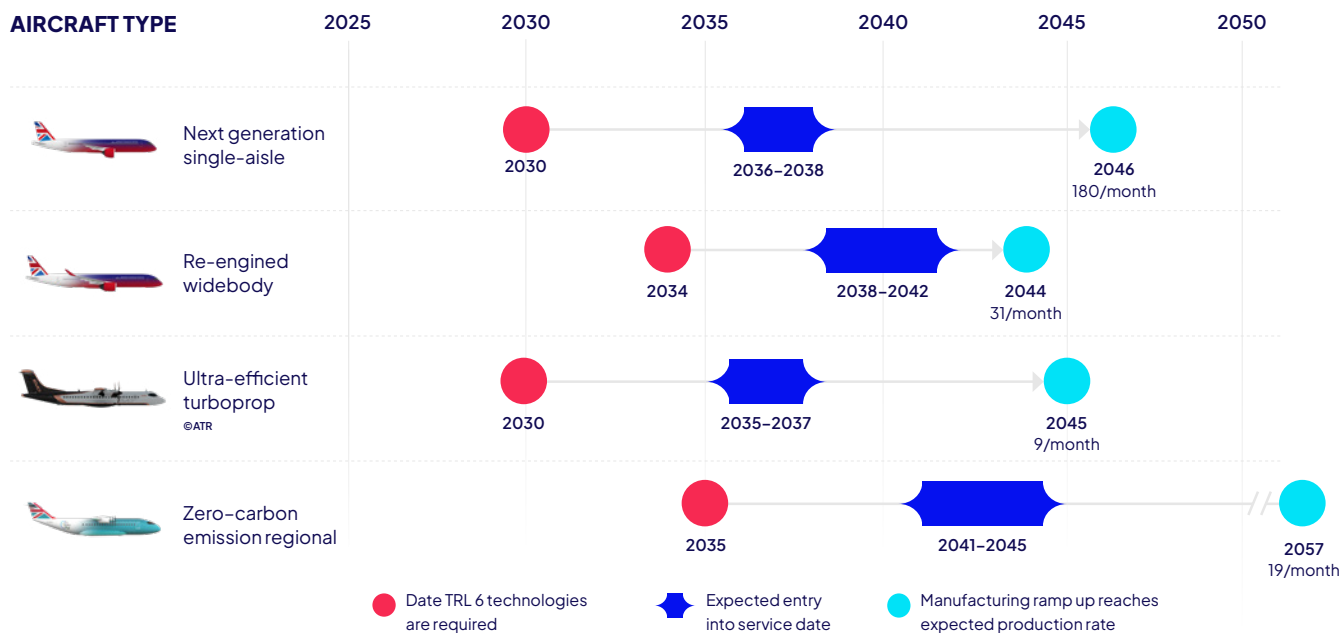


Figure 2 — ATI's future market scenario

MARKET OPPORTUNITY AND UK GROWTH POTENTIAL

The ATI Market Spotlight: Growing UK Composite Capability identified the opportunity to grow the UK composites market value from £726 million in 2022 to over £4.5 billion by 2050. This growth is driven by increasing production throughput more than sixfold by 2050, with the majority of the growth in the late 2030s and early 2040s, aligned to next generation single-aisle product ramp-up.

The aerospace supply chain is a globally competitive environment. To capture the full potential of the opportunity offered by composites in aerospace, the UK must continue to strengthen its technology and supply chain capabilities. This framework document defines the technology journey to address these strategic gaps quickly and demonstrate a compelling offering. Doing so will secure business, prosperity, and continued innovation for decades to come.

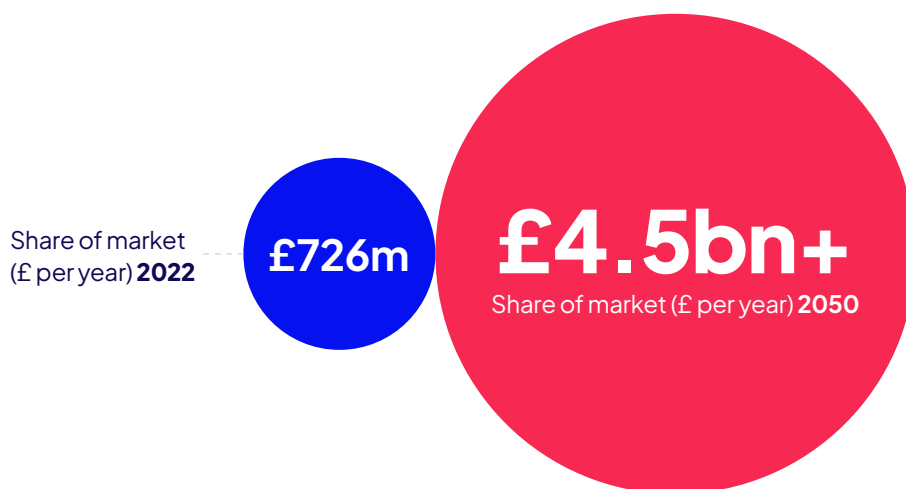


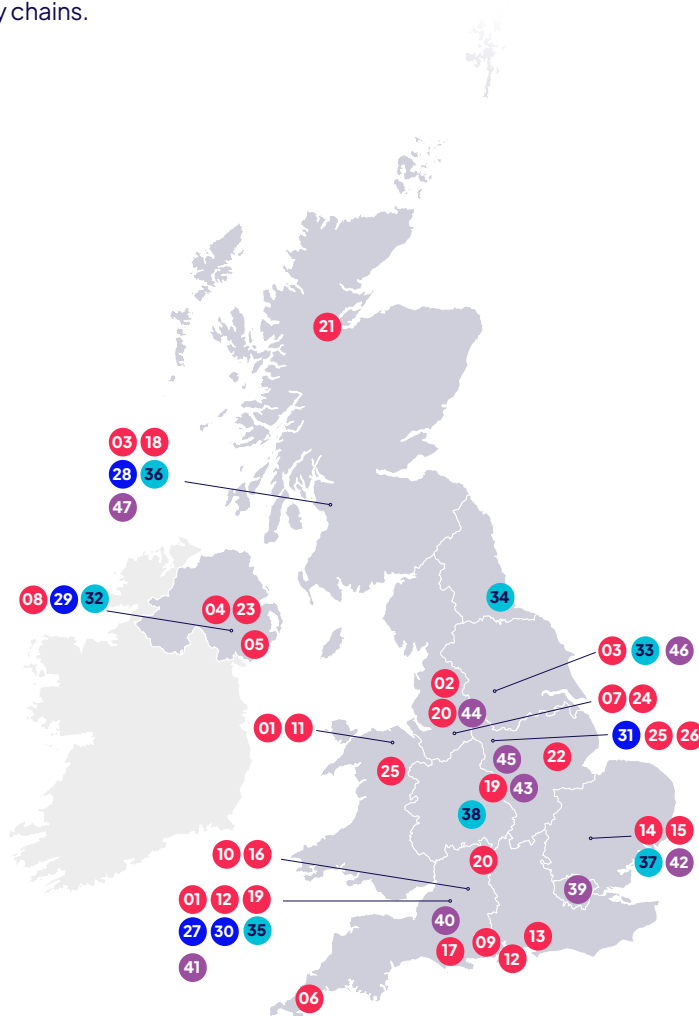
Figure 3 — Potential growth in UK composites market value

THE NEED FOR STRATEGIC INTERVENTION

The scale and urgency of this opportunity demands coordinated sector-wide action. Delivering a globally competitive UK aerospace composites capability requires alignment across government, OEMs, Tier 1 and Tier 2 suppliers, SMEs, research and technology organisations (RTOs), academia, material suppliers, and equipment manufacturers. Within this landscape, targeted technology development programmes, such as the ATI Programme, play a pivotal role in de-risking innovation and accelerating the transition from research to industrial deployment. This approach is closely aligned with the ambitions of the UK Government's Modern Industrial Strategy, which seeks to strengthen high-value manufacturing, accelerate innovation, and build resilient, competitive supply chains.

Industry players

- 01 Airbus
- 02 BAE Systems
- 03 Boeing
- 04 CCP Gransden
- 05 Collins Aerospace
- 06 Composites Integration
- 07 Cygnet Texkimp
- 08 Datum Tool Design
- 09 DFS Composites
- 10 Dowty, GE Aerospace Co.
- 11 Electroimpact
- 12 GKN Aerospace
- 13 Hamble Aerostructures
- 14 Hexcel
- 15 Huntsman
- 16 iCOMAT
- 17 Loop Technology
- 18 Prestwick Aerosystems
- 19 Rolls Royce
- 20 Safran
- 21 SGL Carbon
- 22 SHD Composites
- 23 Short Brothers, a Boeing Co.
- 24 Sigmatex
- 25 Syensqo
- 26 Toray



Industrial Research facilities

- 27 Airbus – AIRTeC
- 28 Boeing – AIC
- 29 Datum Tool Design – LATCAP
- 30 GKN Aerospace – GTC
- 31 Syensqo – Composite Application Centre

Research and Technology organisation

- 32 AMIC – Advanced Manufacturing Innovation Centre
- 33 AMRC – Advanced Manufacturing Research Centre
- 34 CPI – Centre for Process Innovation
- 35 NCC – National Composites Centre
- 36 NMIS – National Manufacturing Institute Scotland
- 37 TWI – The Welding Institute
- 38 WMG – Warwick Manufacturing Group

Academic Institutions

- 39 Imperial College
- 40 University of Bath
- 41 University of Bristol
- 42 University of Cambridge
- 43 University of Loughborough
- 44 University of Manchester
- 45 University of Nottingham
- 46 University of Sheffield
- 47 University of Strathclyde

Figure 4 – UK composites map (not exhaustive)

To date, the ATI Programme has invested more than £900 million in the development of technologies and capabilities spanning composite aerostructures, propulsion, and systems. Major programmes, supported by the ATI Programme, are already demonstrating tangible industrial outcomes against future competitiveness requirements. The Airbus Wing of Tomorrow (WoT) programme is advancing next generation composite wing technologies, including high-rate manufacturing approaches and novel structural concepts, positioning the UK at the forefront of future single-aisle aircraft development. In parallel, Rolls-Royce's UltraFan® programme is delivering large-scale composite fan technologies, showcasing the application of advanced materials and manufacturing methods in next generation propulsion systems.

UK COMPOSITE OPPORTUNITIES

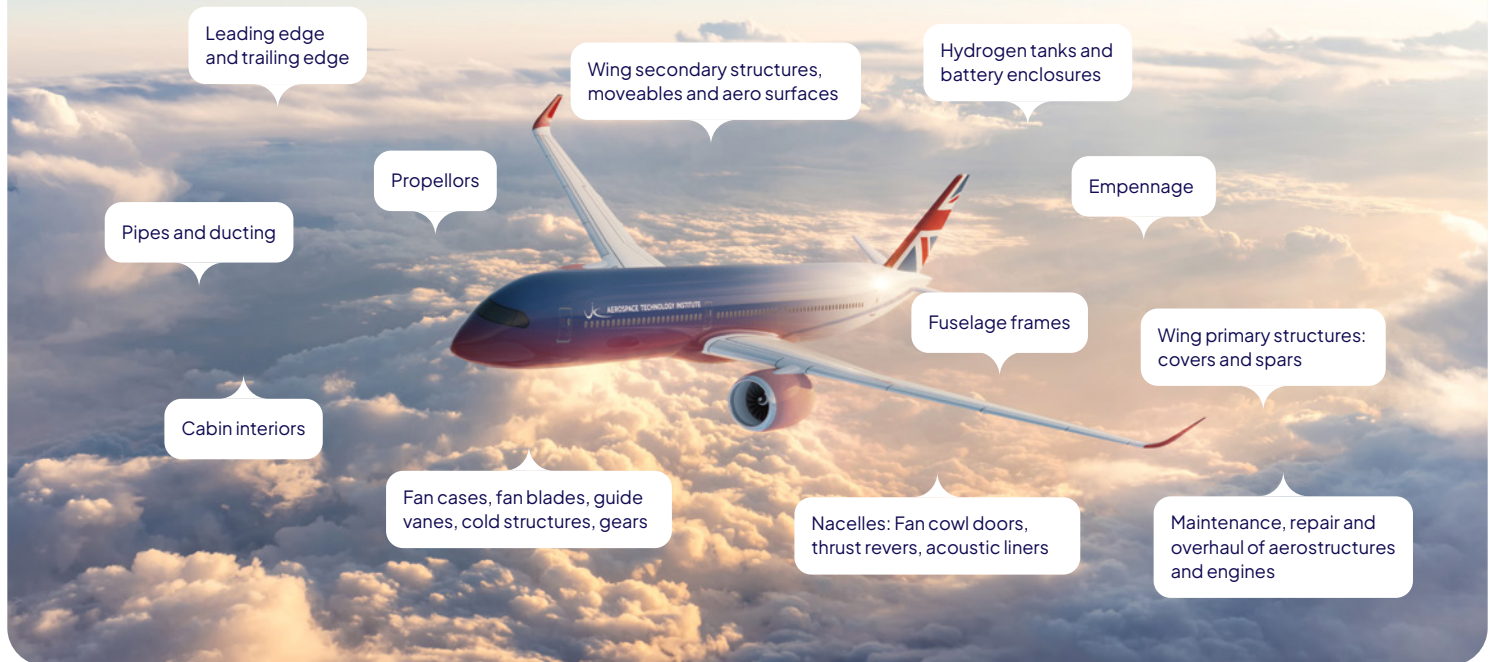
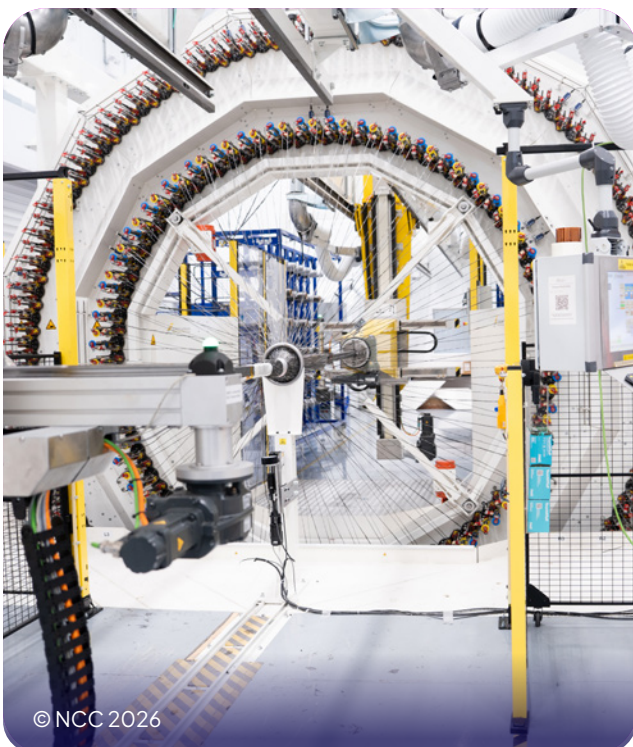


Figure 5 – UK strengths in composites

Complementing these flagship programmes, investments such as University of Sheffield/AMRC COMPASS (Composites at Speed and Scale) and NCC HRMCap are establishing national infrastructure to develop and de-risk high-rate composite manufacturing. Initiatives such as the GKN led ASCEND have advanced end-to-end composite technologies in partnership with cross-sector supply chain organisations. Datum Tool Design-led LATCAP infrastructure project is further strengthening UK's capability by providing open-access infrastructure for the development of large-scale composite tooling technologies. Together, these programmes illustrate how ATI Programme investment is already translating innovation into readiness.



While these advancements represent significant progress, further coordinated effort is required to fully realise their potential at scale and secure future exploitation in the UK. The sector must move fast to ensure that the UK can consistently translate its strengths in research, design, and engineering into fully integrated, scalable industrial systems. Without targeted intervention, there is a risk that the UK will not fully capture the long-term economic opportunity associated with next generation aerospace platforms.

Recognising both the scale of the composites opportunity and the risk of delayed action, the ATI has taken a deliberate, proactive role to shape a strategic intervention that will stimulate, align, and accelerate activity across the UK composites sector. This work is designed to ensure that the technologies, capabilities, and supply chains required for future aerospace platforms are developed in time to secure long-term industrial competitiveness and national prosperity.

A FRAMEWORK FOR GROWTH

The ATI with input from the Composites Working Group has identified five key technology and capability pillars, set out below. Together, these pillars address the critical capabilities required for the UK to convert its existing strengths in aerospace composites into long-term industrial competitiveness. Taking concerted action before future platform and supply chain decisions become fixed is essential

PILLAR	AIM
High-rate industrial systems	Develop and deploy high-rate manufacturing technologies for the end-to-end processing of aerospace composites.
Advanced tooling capabilities	Secure critical process control by improving advanced tooling capability with domestic equipment manufacturers and system integrators.
Novel structural concepts	Improve adoption of UK innovations in disruptive novel technologies and structural architectures to enable highly optimised products.
Material supply chain resilience	Capture more of the manufacturing value chain in the UK and protect the ecosystem with security of material supply.
Depth of the manufacturing supply chain	Maintain a strong Tier 1 UK presence while developing the capability and scale of Tier 2, resulting in an integrated and robust UK supply chain spanning materials, products, equipment and technologies.

Figure 6 – A Framework for addressing the composite market opportunity

This framework builds on the progress already achieved through the ATI Programme and industrial investment, while providing a clear and coordinated pathway to accelerate development, strengthen industrial capability, and align future investment with the needs of upcoming programmes. It has been deliberately developed to bring coherence and alignment to the diverse and sometimes fragmented developments across the UK aerospace composites ecosystem. By connecting capabilities developed in different parts of the ecosystem, it enables these efforts to coalesce into an integrated national capability. In doing so, it supports a shift from isolated excellence to a coordinated, system-level offering, strengthening the UK's position as a global leader in aerospace composites.

The result is an industry-owned framework for delivery that will allow the UK sector to mature key technologies to TRL6 by 2030 and strengthen supply-chain readiness to be in position for future workshare on next generation aerospace platforms. It will embed capability supporting ongoing technology development to protect long-term advantage beyond the next generation of products. This enhanced capability delivers a strong, deep manufacturing supply chain: world-leading Tier 1s and large Tier 2s with differentiated first-in-market technologies and capabilities, as well as capable lower-Tier organisations with flexible, advanced technologies. Finally, this framework ensures industrial sovereignty in key areas, particularly integration, design, tooling and materials which can support both civil and dual-use opportunities, as well as spill-over into other sectors.

PILLAR 1: HIGH-RATE INDUSTRIAL SYSTEMS

To enable the significant expansion in composites use, manufacturing systems will require substantial transformation beyond current practices. While advances in deposition and curing processes are essential to meet demand, high-rate production depends on optimising the entire manufacturing cycle. This includes reducing facility footprints, lowering capital expenditure, and improving energy and resource efficiency.

Inspection, testing, and quality assurance remain key bottlenecks and represent major opportunities for innovation. Streamlining these stages, alongside reducing manual handling, minimising equipment downtime, and improving finishing and delivery processes, will be critical to enhancing competitiveness.

Without fully optimising the entire manufacturing process, the benefits of emerging deposition and curing technologies may go unrealised. Additionally, production may need to be distributed across multiple sites to meet demand, which could diminish the future UK market share.

VISION FOR THE UK

The UK possesses well-established, high-rate industrial systems underpinned by unique technologies that drive process optimisation and efficiency gains throughout the manufacturing cycle.

The UK has a demonstrated end-to-end supply chain for aerospace composite products that delivers components at a high rate using state-of-the-art technology, including UK-based integrators and technology providers.

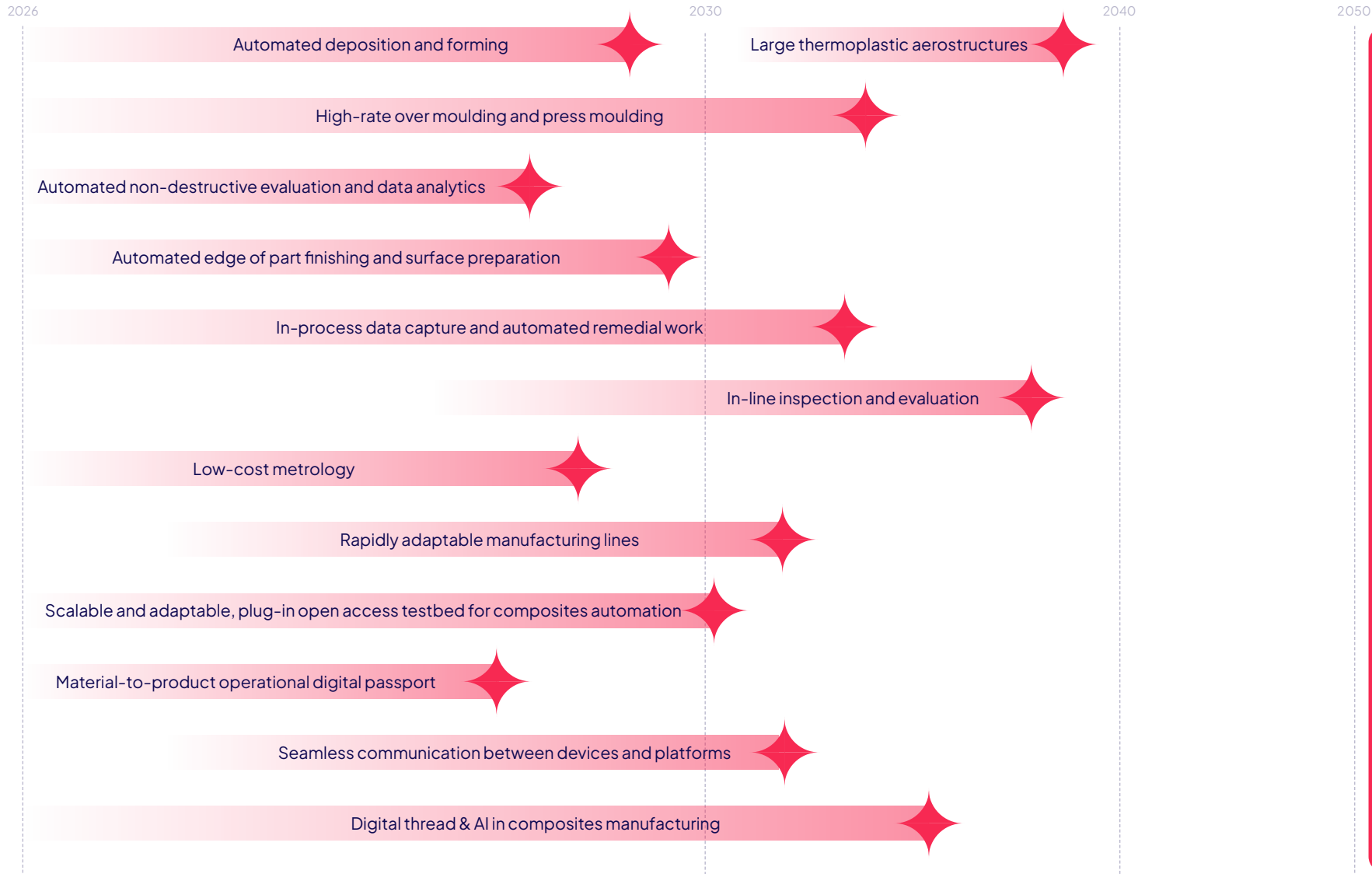
© Melrose/GKN Aerospace

The end-to-end processes for NGSA are demonstrated at TRL6 by 2030. UK operations can leverage widespread expertise and integrated knowledge to bring solutions to market ahead of competitors, enhancing their global competitiveness and increasing the likelihood of securing workshare and displacing non-UK incumbents.

KEY AREAS TO BE ADDRESSED

- ▶ Bottlenecks in product inspection and evaluation.
- ▶ Manufacturing process downtime associated with handling, preparation, and non-value-added operations.
- ▶ Automation and processes fit for purpose.
- ▶ Mature digital technologies.
- ▶ Full digital thread in manufacturing.

HIGH-RATE INDUSTRIAL SYSTEMS



The UK has strong and deep manufacturing supply chains. World leading Tier1s and large Tier2 (Above 400/500 employees in composites operations), with differentiated first in the market technology and capabilities.

Multiple capable medium sized Tier2/3 organisation (200-500 employees) with flexible and advanced state of the art technologies to manufacture a broad range of products.

PILLAR 2: ADVANCED TOOLING CAPABILITIES

UK composite tooling supply chain capability is important because the tools embody key product and process intellectual property through their design and manufacture.

High-rate composites manufacturing demand tooling that is active, intelligent, fully instrumented, and automated. Tooling must support real-time data analysis and in-line correction of the curing profile to enhance quality, reduce cycle times, and minimise waste. ATI Programme-funded projects have made significant progress in this area, with remaining actions needed to design and integrate technologies to provide accurate UK tooling solutions with shorter development timelines.

High rates also require minimised equipment downtime, placing greater demands on tool handling and automation systems that ensure safe operation while maintaining the rigorous quality standards of the aerospace sector. Although the automotive industry has led the way in developing such tooling, overcoming the differences in aerospace resin curing profiles, the larger scale of aerospace components while meeting stringent certification requirements are key to unlocking the full manufacturing potential.

VISION FOR THE UK

The UK has an integrated local supply chain for composite tooling, capable of delivering the design and manufacturing of tools required to support advanced, high-rate processing of aerospace composite components. This capability helps retain critical intellectual property and technical know-how in country, thereby enhancing the competitiveness of the UK aerospace industry.

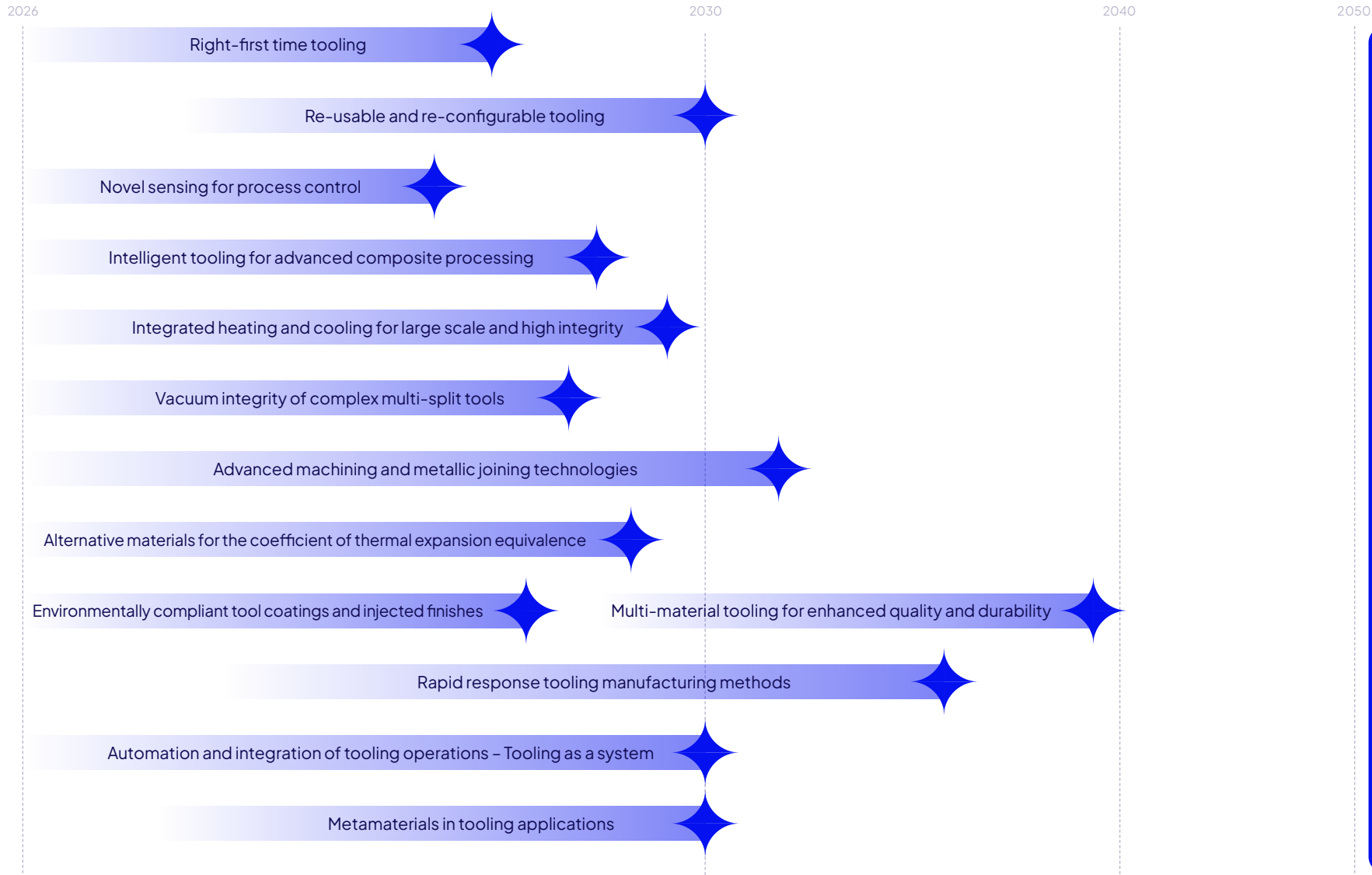
© Datum Tool Design

This supply chain is fully demonstrated with the necessary technologies reaching TRL6 by 2030. This milestone will enable the downstream development and industrialisation of future aerospace products.

KEY AREAS TO BE ADDRESSED

- ▶ Tooling solutions capable of supporting high-rate liquid composite moulding (LCM) processes for aerospace components up to 20 metres in length.
- ▶ Multiple iterations to design and manufacture tooling that meets the precise requirements of end-part manufacturers.
- ▶ Sovereign control over the UK's aerospace composite tooling supply chain.

ADVANCED TOOLING CAPABILITIES



The UK has integrated supply chains for turnkey advanced tooling solutions to satisfy demand of technology critical manufacturing processes.

Technologies, demand level and capacity are common with defence, automotive, energy and marine sector, and this ensures viable business cases and continued support.

PILLAR 3: NOVEL STRUCTURAL CONCEPTS

Historically, the engineering of composite structures has relied on conventional laminate architectures and conservative validation methodologies. However, recent UK advancements in manufacturing techniques and emerging academic research are opening new opportunities. These developments promise to reduce conservatism in structural design, accelerate validation and certification, and unlock the full potential of composite materials. Action is required to continue to mature the new methodologies to TRL6 and demonstrate compliance with aerospace certification requirements.

With the right support, the UK is uniquely positioned to capitalise on these novel approaches. As a first mover, it can leverage capabilities to differentiate the technology offering and capture greater market share in the global aerospace sector. Intellectual property protection of technology, design capability and tooling, while growing the UK supply chains is necessary to maximise UK exploitation and value.

VISION FOR THE UK

The UK is a global leader in efficient composite design solutions, with end-to-end design and build capabilities spanning airframe, propulsion and systems across OEMs and the wider supply chain. By 2030, technology candidates for next generation single-aisle aircraft have reached TRL 6, enabling product development and certification to be delivered entirely through a UK-based supply chain.

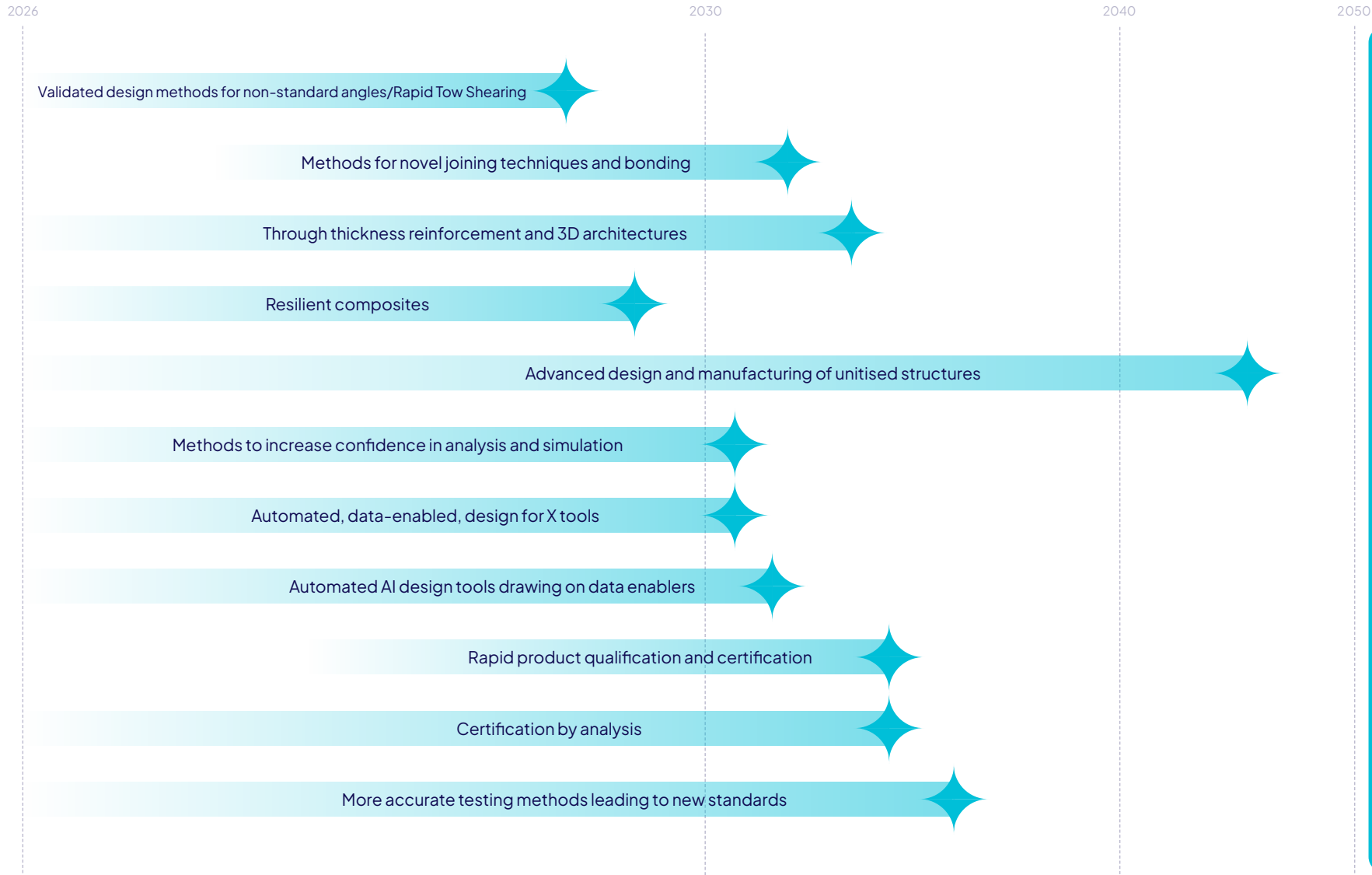
© iCOMAT

Furthermore, the UK benefits from strong collaboration between industry and academia, aligning long-term development strategies to ensure continuous improvement and support for disruptive innovations. This integrated approach helps maintain the UK's competitive edge in emerging technology areas and reinforces its leadership in the global aerospace sector.

KEY AREAS TO BE ADDRESSED

- Qualification of design methods, materials and processes to enable future certification.
- Length of the certification process and associated costs.
- Test requirements and standards.
- Material and design allowables database for novel technology.
- Research vehicle/programme to validate new methods.

NOVEL STRUCTURAL CONCEPTS



The UK is a global leader in efficient composite design solutions, with end-to-end design and build capabilities spanning airframe, propulsion and systems across OEMs and the wider supply chain.

Drive whole aircraft level benefits through advanced composites design capability.

UK organisations offer solution with competitive performance, first in the market, enabling them to win work.

PILLAR 4: MATERIAL SUPPLY CHAIN RESILIENCE

Future UK composites manufacturing will require material supply that could exceed £1 billion in value by 2050 and is key to realise economic potential and benefits across the wider economy and supply chain. Without a UK supply, trade policies and tariffs may further increase the cost of sourcing materials from overseas, reducing UK manufacturing competitiveness.

Creating a UK domestic manufacturing capacity for fibre reinforcements and resin raw materials is a key area for focus. Today the UK benefits from a strong ecosystem of resin formulators, prepreg manufacturers and textile specialists, with deep expertise in composite materials engineering and processing.

The UK's strengths in formulation and chemistry would be further enhanced by establishing a national qualification capability, accelerating the adoption of novel materials in aerospace and safeguarding the UK's competitive advantage.

VISION FOR THE UK

The UK is an agile, competitive, and vertically integrated developer and provider of materials-to-product technologies. With a strong manufacturing base supporting the downstream aerospace sector, the UK is well-positioned to deliver advanced solutions across the value chain.

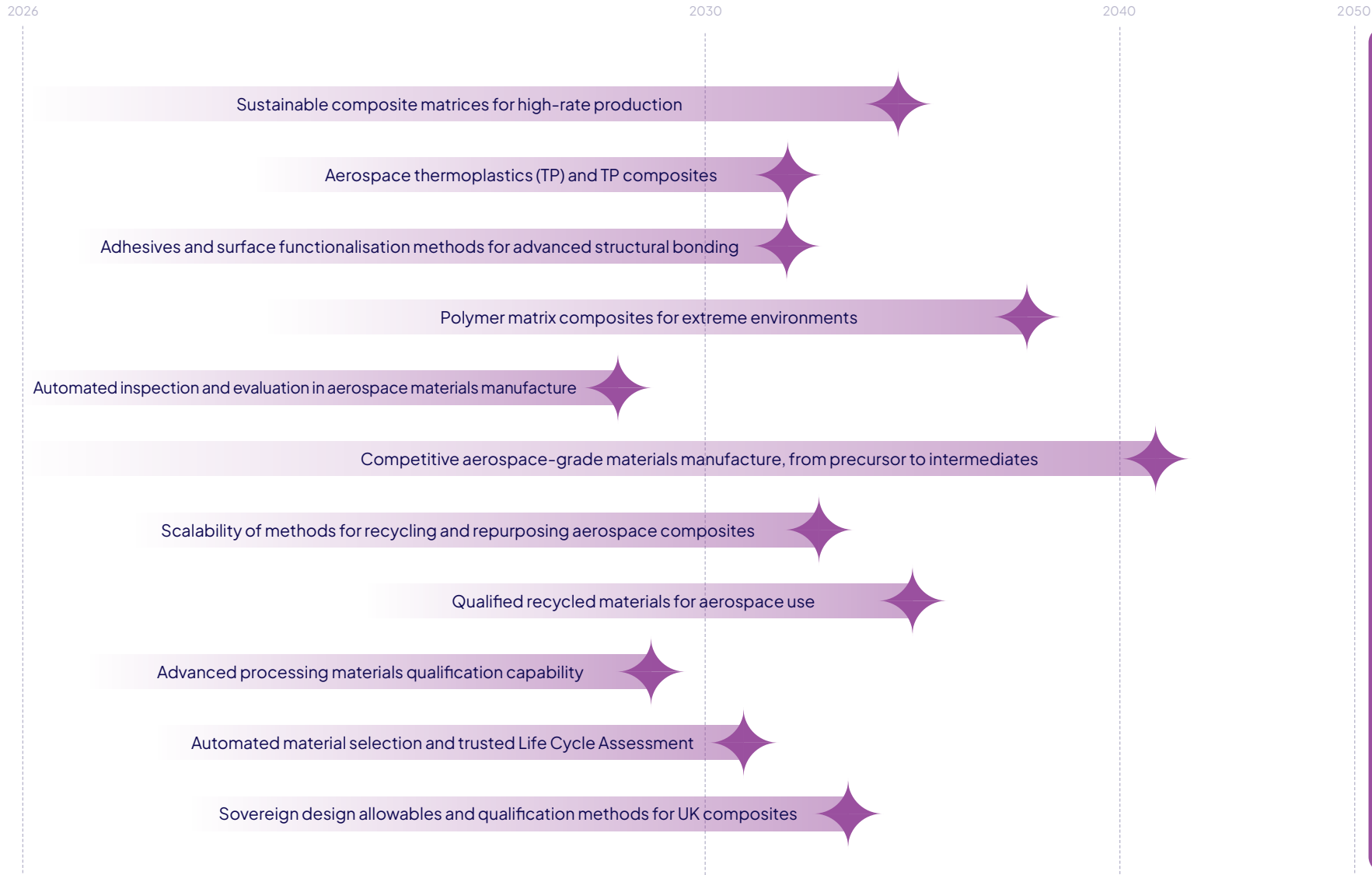
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Novel qualification methods and capabilities are available to support the introduction of sustainable, high-performance materials. These essential innovations not only enable faster integration into aerospace applications but also retain the UK's competitive advantage in a rapidly evolving global market.

KEY AREAS TO BE ADDRESSED

- ▶ Sovereign control and access to material supply.
- ▶ Material qualification barriers.
- ▶ Over-reliance on heritage manufacturing processes and chemistries for aerospace materials.
- ▶ Digital thread in manufacturing.
- ▶ National capability for aerospace material testing and qualification.

MATERIAL SUPPLY CHAIN RESILIENCE



The UK has a resilient, sovereign and competitive material supply chain

UK material providers develop technology differentiated solutions, industrialised in the UK first, with direct benefit for the UK manufacturing supply chain.

Capture material value of UK made aerospace composite products and grow UK export value.

PILLAR 5: DEPTH OF MANUFACTURING SUPPLY CHAIN

A globally competitive supply chain, underpinned by critical and differentiating technologies, with the ability to rapidly iterate and industrialise innovation at scale will determine the UK's success in securing long-term economic value. The UK benefits from a world-leading network of research infrastructure dedicated to composite materials. As technologies for next generation single-aisle platforms mature, the UK research ecosystem is best positioned to enable technology transfer into the wider manufacturing industry. This includes supporting build-to-print suppliers as well as the integration and automation supply chain, particularly UK-based equipment manufacturers.

The UK has a tremendous opportunity to embed novel technological innovation into an integrated, broad, supply chain spanning design, components, materials, equipment, and enabling technologies. This demonstrated manufacturing capability will strengthen the UK's competitiveness to capture workshare when a new large programme is launched.

VISION FOR THE UK

The UK has a broad, diverse, and competitive integrated composites manufacturing supply chain, supported by world-class research infrastructure that enables rapid technology scale-up and adoption of sustainable, high-performance processes. Open-access testbeds and flexible automation capabilities support system integrators and equipment manufacturers, while national material testing accelerates industrial readiness. By 2030, the UK will demonstrate manufacturing capability at TRL6 across key technologies, supported by a strong ecosystem of key suppliers, SMEs, and material and manufacturing technology providers.

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KEY AREAS TO BE ADDRESSED

- ▶ Number of existing large Tier 2 organisations with a footprint in the UK.
- ▶ Development of UK-based composite integrators and equipment manufacturers.
- ▶ Aerospace grade carbon fibre manufacturers in the UK.

THE FIVE PILLARS

A deeper supply chain is a cross-cutting outcome from the previous four roadmaps.

The development of a deeper, broader, and more resilient supply chain, therefore, emerges through the coordinated advancement of technologies, capabilities, and industrial capacity across the framework. In this way, supply chain depth is enabled vertically, as progress in individual technology areas collectively strengthen the ecosystem.

The ATI Programme is a critical enabler to cement a deeper manufacturing supply chain in the UK through three pathways.

- 1. Growing existing UK capabilities, enabling existing players to scale, diversify, develop and adopt advanced technologies.**
- 2. Attracting inward investment, positioning the UK as a competitive location for global players to develop capabilities and expand operations.**
- 3. Fostering collaboration to create integrated and competitive offerings, connecting organisations across the value chain to deliver end-to-end solutions.**

Together, these pathways provide a mechanism to expand supply chain depth, ensuring that technological advancements translate into a resilient and further competitive ecosystem.

HIGH-RATE INDUSTRIAL SYSTEMS

The UK has strong and deep manufacturing supply chains. World-leading Tier1s and large Tier2 (Above 400/500 employees in composites operations), with differentiated first in the market technology and capabilities.

Multiple capable medium sized Tier2/3 organisation (200-500 employees) with flexible and advanced state-of-the-art technologies to manufacture a broad range of products.

ADVANCED TOOLING CAPABILITIES

The UK has integrated supply chains for turnkey advanced tooling solutions to satisfy demand of technology critical manufacturing processes.

Technologies, demand level and capacity are common with defence, automotive, energy and marine sector, and this ensures viable business cases and continued support.

NOVEL STRUCTURAL CONCEPTS

The UK is a global leader in efficient composite design solutions, with end-to-end design and build capabilities spanning airframe, propulsion and systems across OEMs and the wider supply chain.

Drive whole aircraft level benefits through advanced composites design capability.

UK organisations offer solution with competitive performance, first in the market, enabling them to win work.

MATERIAL SUPPLY CHAIN RESILIENCE

The UK has a resilient, sovereign and competitive material supply chain.

UK material providers develop technology differentiated solutions, industrialised in the UK first, with direct benefit for the UK manufacturing supply chain.

Capture material value of UK made aerospace composite products and grow UK export value.

DEEPER MANUFACTURING SUPPLY CHAIN

CONCLUSION

The UK has a substantial opportunity to grow its aerospace composites sector over the coming decades, with next generation single-aisle platforms likely to become a decisive moment for technology adoption and workshare capture.

This Composites Framework for Growth is a call to co-ordinate national action to maximise our ability to deliver on this opportunity. Its purpose is not only to identify promising technologies, but to align investment, industrial capability and supply-chain development around the areas that matter most for UK competitiveness.

The ATI will continue to action this intervention through a second phase of the Composites Working Group, shifting

from development to delivery. This phase will focus on driving implementation, strengthening collaboration, and creating an environment that stimulates the launch of ambitious, high-impact programmes. In doing so, it will ensure that the framework remains dynamic and responsive, supporting the UK's long-term competitiveness, resilience, and prosperity in an increasingly competitive global aerospace market

Progress against this intervention will be included in the annual assessment of progress against the UK aerospace technology strategy, Engineering Growth.



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