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Argentina - Civil Aerospace: Government initiatives fuel volume growth (Strategy, Performance and Risk Analysis)

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Abstracts

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SUMMARY

Market Line’s Strategy, Performance and Risk Analysis Industry reports provide a comprehensive market view including sections on: risk and reward, key industry trends and drivers, industry SWOT analysis, industry benchmarking to compare key performance indicators with regional and global markets, competitive landscape, industry innovation, deals and key developments.

Argentina is the second largest country in South America and has witnessed steady growth in airline passenger traffic due to easy visa policies and increased frequency of flights. Moreover, the introduction of low cost carriers (LCCs) in the country has led demand for narrow-body aircraft to rise. This has also resulted in the growth of the country’s active fleet size, attributed to increased procurement necessitated by the growing average fleet age of several major carriers. Air freight also increased due to growth in trade, transportation and demand for cargo aircraft in the country.

KEY HIGHLIGHTS

Increase in the frequency of flights and launch of low cost carriers to drive air passenger growth

Air passengers registered a growth of 5.8% from 14.2 million in 2015 to 15.1 million in

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2016. Air passengers are forecast to increase at 7.3% CAGR from 16.6 million in 2017 to 22.0 million in 2021. The growth is due to easy visa policies and increase in the frequency of flights within South and Central America and outside the region, including countries such as the US and the UK.

Narrow body aircraft accounted for majority share and to drive to active fleet growth

Active fleet size in Argentina increased at 40.8% from 71 in 2015 to 100 aircraft in 2016. Moreover, it is forecast to increase at 10.2% CAGR from 101 in 2017 to 149 aircraft in 2021. The growth can be primarily attributed to the increased procurement necessitated by the increasing average age of the fleet of several major carriers and the emergence of new low cost carriers.

Demand to serve domestic routes and long haul operations to drive narrow and wide body active fleet

The active fleet size for narrow body aircraft in Argentina increased at 39.3% from 61 in 2015 to 85 in 2016. Moreover, it is forecast to increase at 9.5% CAGR from 85 in 2017 to 122 in 2021. The growth in Argentina is majorly due to the increased demand for low aged used narrow body aircraft on major domestic routes because of their higher fuel efficiency led by lesser weight. The number of active wide body aircraft in Argentina increased at a rate of 50.0% from 10 in 2015 to 15 aircraft in 2016 and estimated to increase at 14.0% CAGR from 16 in 2017 to reach 27 carrier by 2021, primarily attributed to demand for long haul operations.

SCOPE

Risk & Reward Index - The Risk & Reward index compares the position of the Argentina's Civil Aerospace vis-?-vis other countries in the region in terms of specific risk and reward parameters.

Industry Snapshot and Industry View - Key civil aerospace industry statistics includes deliveries, active fleet size and Maintenance, Repair and Overhaul (MRO) expenditure, key industry segments and the trends driving market performance in the Argentine Civil Aerospace market.

Industry SWOT Analysis - Discover the Strengths, Weaknesses, Opportunities and Threats impacting market performance and investment in the Argentine Civil Aerospace market.

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Industry Benchmarking - Benchmark how the Argentine Civil Aerospace industry market is performing compared to regional and global markets in terms of fleet size, deliveries, MRO expenditure, aircraft and helicopter capital expenditure, air passengers, fleet age and air freight.

Competitive Landscape - Overview of relevant players in the Argentine Civil Aerospace industry such as manufacturers, and airline operators, with each player in the relevant category compared with its peers in terms of relevant industry indicators.

REASONS TO BUY

How is the market performing in terms of: indicators such as air passengers, air freight, deliveries of narrow and wide body aircraft, capital expenditure on single aisle, twin aisle, regional, business jets and cargo aircraft, fleet age, capital expenditure on helicopter, MRO expenditure and billing?

How risky is it to invest in the Argentine Civil Aerospace industry compared to other countries in South and Central America?

What is driving the performance of key industry segments such as deliveries, fleet size and MRO expenditure?

Who are the leading players in the Argentine Civil Aerospace industry and their overview and product portfolio?

What trends are being witnessed within the Argentine Civil Aerospace industry?

What are the Argentine Civil Aerospace industry’s Strengths and Weaknesses and what Opportunities and Threats does it face?

What are the recent developments and innovations in the Argentine Civil Aerospace industry?

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