

Australia - Civil Aerospace: Increasing international passengers driving 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.

In Australia, matters related to Civil Aerospace are regulated by the civil aviation safety authority. The Australian government signed an open skies agreement with the Chinese government in December 2016. The agreement enables airline operators in Australia to operate flights to more Chinese cities and increase the frequency of flights on important routes between the two countries, thereby increasing passenger demand on routes between China and Australia. Australia generally scores less on the Global Risk Index Matrix than the global and regional median. Increasing public expenditure on capital incentive areas, such as health and manufacturing, has enabled the country to perform well on key macroeconomic indicators so it poses lesser macroeconomic risks than the global median.

KEY HIGHLIGHTS

Introduction of new routes and international tourists to drive air passenger growth

In Australia, the number of air passengers increased at a growth rate of 4%, from 69.8 million in 2015 to 72.6 million in 2016, and is expected to increase at a CAGR of 2.1% over the forecast period, from 73.7 million in 2017 to 80.2 million in 2021. The increase in the number of air passengers is primarily attributed to an increase in the number of international passengers, due to rising disposable incomes and the start of operations on new long-haul international routes, which were enabled by the open skies agreement between Australia and China

Increased single aircraft procurement to drive capital expenditure

Capital expenditure on aircraft in Australia increased at a growth rate of 8.7%, from US\$2,271 million in 2015 to US\$2,469 million in 2016, and is expected to increase at a CAGR of 3.1% over the forecast period, from US\$2,150 million in 2017 to US\$2,436 million in 2021, due to the increased procurement of single aisle aircraft, primarily by low-cost carriers.

Deliveries expected to decline in the forecast period

In Australia, the number of deliveries declined from 10 in 2015 to three in 2016 and is expected to post a CAGR of -2.6%, from 10 in 2017 to nine in 2021. The decline is due to fluctuating fuel prices and the competitive pricing policy followed by airline operators to attract more customers. As a result, airline profit margins are declining and this limits the purchase of new aircraft.

SCOPE

Risk & Reward Index - The Risk & Reward index compares the position of the Australia'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 Australian Civil Aerospace market.

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

Industry Benchmarking - Benchmark how the Australian 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 Australian 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%li%and wide-body aircraft, capital expenditure on single aisle, twin aisle, regional, business jets and cargo aircraft, fleet age, capital expenditure on helicopters, MRO expenditure and billing?

How risky is it to invest in the Australian civil aerospace industry compared to other countries in the Asia-Pacific region?

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

Who are the leading players in the Australian civil aerospace industry and what is their product portfolio?

What trends are being witnessed within the Australian civil aerospace industry?

What are the Australian civil aerospace industry's strengths and weaknesses, and what opportunities and threats does it face?

What are the recent developments and innovations in the Australian civil aerospace industry?

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