

Belgium - Civil Aerospace: Increasing number of passengers drive demand (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.

Belgium has one of the best infrastructure networks in Europe. The country is recognized as the natural gateway to Europe as it is located in the middle of several major European countries, such as the UK, France, Germany, Italy, Spain and the Netherlands. Air connectivity is also good; Belgium's cargo airport is among the top cargo airports in Europe and has one of the fastest air cargo handling and distribution centers in the EU. Most of the European highways, such as the E40 and E42, cross Belgium, connecting France and Germany. Therefore, the country is accessible via roads from all sides. However, the strong road network impacts air services.

KEY HIGHLIGHTS

Improved frequency of flights and proliferation of LCCs are expected to drive growth in terms of the number of air passengers

In Belgium, air passengers grew at 9.3%, from 11.5 million in 2015 to 12.5 million in 2016, and are forecast to increase at a CAGR of 5.4%, from 13.0 million in 2017 to 16.0 million in 2021. The growth is due to the “Hi Belgium Pass” initiative and the reduction in fares on popular domestic and international routes run by LCCs.

Increased medium helicopter procurement to drive helicopter capital expenditure growth

In Belgium, capital expenditure on helicopters stood at US\$40 million in 2016 and is forecast to increase at a CAGR of 2.9%, from US\$50 million in 2017 to US\$56 million in 2021. The growth is primarily driven by the procurement of medium sized helicopters for executive use and to access remote locations. Also, the life of a helicopter is approximately 30 years, which is five years more than a commercial aircraft, and the value of a medium sized helicopter depreciates at a much slower rate.

Emergence of technologically advanced aircraft to drive growth

In Belgium, aircraft deliveries increased from a single delivery in 2015 to two deliveries in 2016. Similarly, it is forecast to increase at a CAGR of 13.6%, from three deliveries in 2017 to five deliveries in 2021. The increase is due to the increased demand for technologically advanced and fuel efficient aircraft.

SCOPE

Risk & Reward Index - The Risk & Reward index compares the position of the Belgian civil aerospace industry 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 include deliveries, active fleet size and Maintenance, Repair and Overhaul (MRO) expenditure, key industry segments and the trends driving market performance in the Belgian civil aerospace market.

Industry SWOT Analysis - Discover the Strengths, Weaknesses, Opportunities and Threats impacting market performance and investment in the Belgian civil aerospace market.

Industry Benchmarking - Benchmark how the Belgian 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 the relevant players in the Belgian 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 Belgian civil aerospace industry compared to other countries in Europe?

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

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

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

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

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

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