

# **Brazil -Civil Aerospace: High volume to fuel 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.

Brazil is one of the top five commercial jet manufacturing countries in the world and stands among the top 10 exporters of aircraft and parts to the US and the UK. Although nominal GDP declined at a CAGR of 7.6%, from US\$2.5 trillion in 2012 to US\$1.8 trillion in 2016 due to economic and political crises, aircraft part procurements continued from the US. Brazilian civil aviation industry is led by Embraer, the world's third-largest aircraft manufacturer, which delivered 108 commercial jets in 2016. The other major player is Helibras, a subsidiary of Airbus Helicopters. Civil aviation Brazil is regulated by the National Civil Aviation agency (ANAC). In 2017 the agency signed a new agreement with the Civil Aviation Administration of China (CAAC) as an expansion of the agreement signed between both the countries in 1994. The new agreement will support growth in passenger and cargo traffic by expanding air services between two countries. Through this agreement, existing companies or new companies operating between the two countries can use any country as an intermediate stopover point.

### **KEY HIGHLIGHTS**

### Increase in disposable income to drive passenger volume

In Brazil, passenger volume declined at a rate of -7.7%, from 102.0 million in 2015 to 94.1 million in 2016. However, as levels of disposable income rise, opportunities for business and leisure travel is forecast to evolve. The number of airline passengers is forecast to reach 108.2 million in 2021, at a CAGR of 1.6%.

### Aircraft capital expenditure to decline

CAPEX in Brazil recorded a growth rate of 40.8%, from US\$1.3 billion in 2015 to US\$1.9 billion in 2016, owing to procurements by airlines and aircraft leasing companies. It is forecast to decline over the forecast period at a CAGR of -2.0%, to reach US\$1.6 billion in 2021. CAPEX on single-aisle aircraft stood at US\$830.0 million in 2016 and is forecast to decrease at a CAGR of -3.9%, to reach US\$745.0 million in 2021. CAPEX on twin-aisle aircraft stood at US\$671.0 million in 2016 and is forecast to increase at a CAGR of 0.9% to reach US\$685.0 million in 2021.

### Aircraft deliveries to decline over the forecast period

In Brazil, the volume of aircraft deliveries decreased at rate of -57.1%, falling from 42 units in 2015 to 18 in 2016. The number is forecast to decrease at a CAGR of -14.3%, to reach 14 aircraft in 2021, caused by the market saturation of narrow-body carriers.

## SCOPE

**Risk & Reward Index** - The Risk & Reward index compares the French civil aerospace industry with other countries in Europe on specific risk and reward parameters.

**Industry Snapshot and Industry View** - Key civil aerospace industry statistics includes deliveries, active fleet size, maintenance, repair and overhaul (MRO) expenditure, key industry segments and the trends driving market performance in the French civil aerospace market.

**Industry SWOT Analysis** - Discover the strengths, weaknesses, opportunities and threats impacting market's performance.

**Industry Benchmarking** - Benchmark how the French civil aerospace industry is

performing compared to regional and global markets in terms of fleet size, deliveries, MRO expenditure, aircraft and helicopter CAPEX, passenger volumes, fleet age, and air freight.

Competitive Landscape - Overview of relevant players in the French civil aerospace industry such as manufacturers, and airline operators, with each player in the relevant category compared against its peers in terms of a set 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 Brazilian 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 Brazilian Civil Aerospace industry and their overview and product portfolio?

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

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

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

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