

Canada - Civil Aerospace: A volume driven market (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.

The Canadian Transport Ministry has been funding the development of small airports under the airport capital assistance program since 1995. The government has invested US\$785.9 million¹ since 1995, which led to the construction of 13 new airports, further increasing the passenger handling capacity of airports in the country and improving the security and safety standards of airports. Canada's household disposable income increased with a rate of 3.3% over the historic period which, combined with the introduction of new routes and growing trade ties between Canada and several countries worldwide, is driving air passenger growth in the country.

KEY HIGHLIGHTS

Canada's active fleet size is expected to increase

The active fleet size in Canada increased with a rate of 11.8%, from 755 in 2015 to 844 in 2016, and is forecast to increase at a CAGR of 7.3%, from 898 in 2017 to 1,190 in

2021. The burgeoning number of air passengers is driving growth of the active fleet size as airline operators procure more aircraft in order to meet increasing demand and frequency of flights on existing popular routes.

Aircraft deliveries and billing amount to rise

In Canada, the number of deliveries stood at 38 in both 2015 and 2016, and is forecast to increase at a CAGR of 8.4%, from 42 in 2017 to 68 in 2021. The increase is primarily attributed to fleet expansion initiatives by airlines due to the high number of air passengers on international and domestic routes. Billing declined with a rate of -11.9%, from US\$2,433.3 million in 2015 to US\$2,143.8 million in 2016. However, due to the increased procurement of narrow-body aircraft, it is forecast to increase at a CAGR of 17.0%, from US\$3,050.5 million in 2017 to US\$5,728.3 million in 2021.

Operational and MRO expenditure to decline

In Canada, operational expenditure increased with a rate of 1.2%, from US\$15.6 billion in 2015 to US\$15.8 billion in 2016. However, due to employee layoffs and the expected fleet reduction by Air Canada, it is forecast to decline at a CAGR of -7.0%, from US\$14.9 billion in 2017 to US\$11.1 billion in 2021. Similarly, though MRO expenditure increased with a rate 8.1%, from US\$1,001.2 million in 2015 to US\$1,082.5 million in 2016, it is forecast to decline at a CAGR of -1.1%, from US\$1,025.2 million in 2017 to US\$981.5 million in 2021 due to the increased procurement and leasing of new aircraft.

SCOPE

Risk & Reward Index - The Risk & Reward index compares the position of the Canadian 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 Canadian civil aerospace market.

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

Industry Benchmarking - Benchmark how the Canadian 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 Canadian 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 Canadian civil aerospace industry compared to other countries in North 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 Canadian civil aerospace industry and their overview and product portfolio?

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

What are the US civil aerospace industry's Strengths and Weaknesses and what Opportunities and Threats does it face?

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

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