Chile - 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.

Chile is the most competitive country in the South American region. According to the Global Competitiveness Report 2015-16, Chile was ranked 35th out of 140 economies. The civil aviation industry in Chile witnessed steady growth in the number of air passengers owing to increased disposable incomes. Moreover, the total active fleet size witnessed growth due to a rise in the procurement of narrow-body and wide-body aircraft. The procurement of aircraft increased due to the launch of several new regional and long-haul routes, along with the procurement of used aircraft. The aviation sector contributes significantly to the country's economy, generating 3.0% of GDP and 190,000 jobs. Moreover, the industry's foreign direct investments valued US$210.0 billion in 2015.

KEY HIGHLIGHTS

Increasing business and leisure trips to drive the number of passengers

The number of air passengers in Chile increased significantly at a rate of 9.1%, from 15.0 million in 2015 to 16.4 million in 2016, and is forecast to increase at a CAGR of 5.2%, from 17.3 million in 2017 to 21.2 million by 2021. Growth in the number of air passengers has significantly influenced expenditure on aircraft.

Optimum number of aircraft in market will lead capital expenditure to decline

Capital expenditure (CAPEX) on aircraft grew from US$1,330.0 million in 2015 to US$2,721.7 million in 2016 owing to procurement measures by airlines and aircraft leasing companies, primarily driven by the rise in demand for regional jets. However, it is forecast to decrease at a CAGR of -1.9%, from US$2,756.7 million in 2017 to US$2,556.7 million by 2021, owing to an anticipated decline in new aircraft deliveries.

Growth of the active fleet size

In Chile, the number of aircraft deliveries increased at rate of 22.2% from nine in 2015 to eleven aircraft in 2016. However, it is forecast to decrease at a CAGR of -14.3%, from fourteen in 2017 to twelve aircraft by 2021 primarily driven by a significant fall in the delivery of wide-body aircraft.

SCOPE

Risk & Reward Index - The Risk & Reward index compares the position of the Chilean Civil Aerospace with regards to 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 Chilean Civil Aerospace market.

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

Industry Benchmarking - Benchmark how the Chilean 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.

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Competitive Landscape - Overview of relevant players in the Chilean 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 Chilean 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 Chilean Civil Aerospace industry and what is their overview and product portfolio?

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

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

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

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