

China - Civil Aerospace: Government initiatives to drive 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.

China is one of the fastest growing economies in the world. The sheer size of its population offers a huge market, and makes it an attractive business destination. The government plans to invest in the construction of new airports, as well as the development of existing facilities and aircraft manufacturing and research. Such investments will lead to the introduction of more destinations and routes by operators, resulting in an increased number of passengers, in turn leading to the growth of China's civil aerospace industry.

In order to boost trade and diplomatic ties with European and Asian countries, the Chinese Government proposed the One Belt One Road (OBOR) initiative in 2013. As part of this initiative, the government signed inter-governmental aviation pacts with countries who are a part of the OBOR initiative and has pledged to start new aviation routes from China to several countries. This initiative will lead to a demand for Chinese aircraft and aircraft parts in OBOR member nations, along with stimulate demand for

new aircraft in China as the number of passengers will increase with the introduction of new routes.

KEY HIGHLIGHTS

Increasing number of tourists to drive the number of air passengers

In China, the number of air passengers increased with a rate of 11.9%, from 436.2 million in 2015 to 488.0 million in 2016, and is forecast to increase at a CAGR of 6.8%, from 516.8 million in 2017 to 673.4 million in 2021. This will lead to renewed growth opportunities for manufacturers, as with the growing number of air passengers, demand for aircraft will also increase.

Increased procurement will lead capital expenditure and deliveries to rise

In China, capital expenditure on aircraft increased with a rate of 0.1%, from US\$21.36 billion in 2016 to US\$21.37 billion in 2016, while capital expenditure on helicopters increased with a rate of 29.2%, from US\$912.3 million in 2015 to US\$1,178.4 million in 2016. The number of aircraft deliveries increased with a rate of 0.8%, from 296 in 2015 to 298 in 2016 and is forecast to increase at a CAGR of 10.8%, from 321 in 2017 to 484 in 2021.

Active fleet size to grow

In China, the active fleet size increased with a rate of 15.1%, from 2,467 in 2015 to 2,668 in 2016, and is forecast to increase at a CAGR of 9.3%, from 3,153 in 2017 to 4,493 in 2021. Growth is primarily due to the proliferation of low cost carriers and fleet expansion initiatives by existing airline operators in order to serve more routes.

SCOPE

Risk & Reward Index - The Risk & Reward index compares the position of the China's Civil Aerospace industry 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, maintenance, repair and overhaul (MRO) expenditure, key industry segments and the trends driving market performance in the Chinese Civil Aerospace market.

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

Industry Benchmarking - Benchmark how the Chinese 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 Chinese 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 helicopters, MRO expenditure and billing?

How risky is it to invest in the Chinese Civil Aerospace industry compared to other countries in Asia-Pacific?

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

Who are the leading players in the Chinese Civil Aerospace industry and what is their overview and product portfolio?

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

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

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

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