

Colombia - Civil Aerospace: High volume will 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.

Colombia's GDP declined at a CAGR of 6.2% to reach US\$286.2 billion in 2016 and will accelerate from 2017 onwards due to a recovery in oil prices, inflation control measures, and reduction in interest rates by Colombia's monetary authorities. GDP is expected to post a CAGR of 5.1% to reach US\$383.4 billion by 2021. Growth will be attributed to investments in infrastructure, technology, political stability, a favorable business environment, and strong economic policies. The government passed a public private partnership (PPP) law, according to which, foreign companies can invest in the industry through a build-operate-transfer contract. The initiative will ensure infrastructure development. The increase has been driven by the growth of passenger numbers and cargo. The country's civil aviation industry is now turning into an attractive prospect for US and other foreign companies.

KEY HIGHLIGHTS

Increase in leisure and business trips to drive passenger volume

Air passengers in Colombia increased at rate of 4.4%, from 30.9 million in 2015 to 32.3 million in 2016 and will post a CAGR of 6.8%, to rise from 36.2 million in 2017 to 47.1 million passengers in 2021. The trend for leisure and business trips is turning out to be a major driver for expenditure on aircraft.

A decline in procurement of twin-aisle aircraft in the market to cause capital expenditure to slow

Single-aisle aircraft capital expenditure stood at US\$1,320.6 million in 2016 but is forecast to post a CAGR of 0.9%, to reach US\$1,390.0 million in 2021. Capital expenditure on twin-aisle will decline owing to limited procurement over the forecast period.

Growth in orders for wide%li%and narrow-body aircraft to drive a growth in deliveries

In Colombia, the volume of aircraft deliveries decreased at rate of -58.8%, from 17 aircraft in 2015 to seven in 2016 due to a decline in the number of single-aisle planes. It is expected to post a CAGR of 3.4%, from 14 units in 2017 to 16 in 2021, driven by growth in the delivery of wide%li%and narrow-body aircraft.

SCOPE

Risk & Reward Index - The Risk & Reward index compares the position of Colombia's Civil Aerospace with that of other countries in the region in terms of specific risk and reward parameters.

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

Industry SWOT Analysis - Discover the strengths, weaknesses, opportunities and threats impacting market performance and investment in the Colombian Civil Aerospace market.

Industry Benchmarking - Benchmark how the Colombian 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, passengers, fleet age, and air freight.

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

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

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

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

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