

France - Civil Aerospace: Volume driven industry (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.

France is the sixth-largest economy in the world and offers attractive propositions for several industries. It ranked high on World Bank's Doing Business 2017 report with only 3.5 days required to start a business; the OECD average of 8.3 days. The country's economy is primarily driven by exports and its nominal GDP rose from US\$2.4 trillion in 2015 to US\$2.5 trillion in 2016. France is a global air transport hub with 500 airports; the two largest, Charles de Gaulle and Orly in Paris, manage a large number of passengers annually. A world-class infrastructure network enables France to offer international investors excellent conditions and drives the nation's economic engine.

KEY HIGHLIGHTS

LCC expansion to drive passenger traffic

In France, passengers recorded a marginal growth of 0.5%, from 65.0 million in 2015 to

65.4 million in 2016. It is expected to post a forecast-period CAGR of 0.3%, to reach 65.8 million in 2021 as the introduction of new long-haul international routes drives passenger volumes. Air France KLM has launched nine new long-haul routes, increasing its operating capacity.

Capital expenditure growth in France to show fluctuating trend

France's capital expenditure recorded an annual growth rate of 28.4%, rising from US\$2.0 billion in 2015 to US\$2.6 billion in 2016. However, it will post a CAGR of -2.1%, to reach US\$2.7 billion in 2021. The decline will be partly attributed to the young fleet maintained by France, diminishing expenditure on new equipment and capital expenditure of twin-aisle aircraft.

Deliveries expected to increase over the forecast period

Aircraft deliveries registered an annual growth rate of 41.7%, from 12 units in 2015 to 17 in 2016, and are anticipated to post a CAGR of 4.3%, from 11 units in 2017 to 13 in 2021. Growth will be driven by the proliferation of LCCs and their flight frequency expansion on key regional routes.

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%li%and wide-body aircraft, capital expenditure on single-aisle airframes, twin-aisle airframes, regional, business jets and cargo aircraft, fleet age, capital expenditure on helicopters, MRO expenditure and billing?

How risky is it to invest in the French civil aerospace industry compared to other countries in Europe?

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

Who are the leading players in the French civil aerospace industry and their overview and product portfolio?

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

What are the French civil aerospace industry's strengths and weaknesses and what opportunities and threats does it face?

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

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