Germany - Civil Aerospace: Low airline profitability affecting aircraft delivery (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.

Despite a challenging environment within the EU, Germany continues to be one of the most dynamic economies in the world. It remains one of the most politically and economically influential countries in the EU.

The presence of innovative small and medium-sized enterprises (SMEs), also known as German Mittlestand, is a driver of the labor market. During the financial crisis of 2008-2009, Germany's unemployment rate decreased, in direct contrast to all other eurozone countries. The Federal Office for Civil Aviation of Germany is the regulatory body responsible for framing guidelines for various aspects of civil aviation. It is responsible for protecting passenger rights and monitoring the air worthiness of airlines

KEY HIGHLIGHTS

An increase in disposable income will drive the number of passenger volumes

In Germany, passenger volumes increased at growth rate of 5.6%, from 118.1 million in 2015 to 124.7 million in 2016. It is forecast to post a CAGR of 2.8%, from 125.7 million in 2017 to 140.3 million in 2021. An increase in disposable income will support a preference for air travel. According to the European Central Bank, nominal disposable income per capita increased at 1.8% in 2016.

Aircraft deliveries along with equipment procurement to spur capital expenditure growth

Capital expenditure on aircraft stood at US$2.2 billion in 2016 and will post a CAGR of 10.7%, from US$2.5 billion in 2017 to US$3.7 billion in 2021. Aircraft deliveries will drive capital expenditure.

Leasing and used aircraft procurement to affect growth in new aircraft deliveries

In Germany, aircraft deliveries increased at an annual growth rate of 20.7%, from 29 aircraft in 2015 to 35 deliveries in 2016. Over the forecast period, it will post a CAGR of -9.2% CAGR, from 28 units in 2017 to 19 in 2021. This is due to a growth in number of used and lease aircraft as a part of cost reduction initiatives by airline operators.

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.

+44 20 8123 2220
info@marketpublishers.com

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 aircraft, twin-aisle aircraft, regional, business jets and cargo aircraft, fleet age, capital expenditure on helicopter, MRO expenditure and billing?

How risky is it to invest in the German 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 German civil aerospace industry and their overview and product portfolio?

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

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

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

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