

India - Civil Aerospace: High demand fueling 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.

The civil aviation industry in India has recorded steady growth in the number of air passengers due to a rise in productivity and household disposable income. An increasing number of trade deals with various countries has greatly supported the growth of India's air freight carriage. Additionally, the Government of India has been taking several initiatives to develop the civil aviation industry by entering into agreement to encourage connectivity and affordable travel to and from India. The government is attempting to build investors' confidence by implementing favorable foreign direct investment (FDI) policies, expediting approvals for pending projects, and passing market liberalization reforms. The government has also permitted 100% FDI in the aerospace industry.

KEY HIGHLIGHTS

Demand for air travel to drive aircraft procurement

With the second-highest passenger volumes in Asia-Pacific after China, India dominates the civil aviation market. Passenger volume registered an annual growth rate of 20.9%, from 98.9 million in 2015 to 119.6 million in 2016 and are expected to post a CAGR of 6.9%, from 118.7 million in 2017 to reach 154.7 million in 2021. An increase in the demand for airline services will encourage the country to procure more aircraft which will bolster the fleet size of planes in active service. New aircraft deliveries are anticipated to post a CAGR of 14.9%, from 31 units in 2017 to 54 in 2021. Narrow-body aircraft deliveries are forecast to post a CAGR of 14.2%, from 27 aircraft in 2017 to 46 in 2021.

Growing procurement of single-aisle aircraft to drive capital expenditure

Capital expenditure on single-aisle aircraft accounted for 74.1% of all capital expenditure in the civil aerospace industry in 2016. It stood at US\$3.4 billion in 2016 and is forecast to post a CAGR of 6.6%, from US\$3.7 billion in 2017 to US\$4.7 billion in 2021, due to an increase in the demand for low-cost carriers (LCCs). The growing procurement of narrow-body aircraft to service the regional market will drive capital expenditure. The volume of narrow-body planes procured by airline operators in India registered an annual growth rate of 51.3%, from 39 units in 2015 to 59 in 2016.

Establishment of new MRO facilities to drive MRO expenditure

Maintenance, repair and overhaul (MRO) expenditure registered an annual growth rate of 6.9%, from US\$498.5 million in 2015 to US\$532.8 million in 2016. It is forecast to post a CAGR of 5.8%, from US\$595.5 million in 2017 to US\$745.9 million in 2021. MRO expenditure is anticipated to be supported by the establishment of new facilities in India.

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

How risky is it to invest in the Indian civil aerospace industry compared to other countries in Asia-Pacific region?

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

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

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

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

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

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