

Indonesia - Civil Aerospace: Shift towards indigenous aircraft (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.

Factors hindering economic growth include terror threats from militant groups and an underdeveloped financial market, which has resulted in liquidity issues for companies. However, due to an increase in investments by foreign firms, nominal GDP is expected to post a CAGR of 8.1%, to reach US\$1.4 trillion in 2021. The Directorate General of Civil Aviation is the regulatory body responsible for the formulation and implementation of policy. It provides technical guidance, compiles standards and norms, and evaluates safety and service quality.

KEY HIGHLIGHTS

Demand for services to drive aircraft procurement

Passenger volume recorded an annual growth rate of 7.1%, from 90.1 million in 2015 to 96.5 million in 2016 and is anticipated to post a CAGR of 4.4%, from 100.3 million passengers in 2017 to 119.0 million in 2021. This is driving deliveries, which will grow at

an annual rate of 6.0%, from 72 units in 2017 to 91 in 2021. Narrow-body aircraft deliveries are forecast to post a CAGR of 5.7%, from 64 in 2017 to 80 in 2021. Wide-body aircraft deliveries are expected to grow at CAGR of 8.3%, from eight units in 2017 to 11 in 2021.

Capital expenditure on aircraft and helicopters to increase

Capital expenditure on aircraft stood at US\$5.0 billion in 2016 and is expected to post a CAGR of 3.8%, from US\$5.4 billion in 2017 to US\$6.3 billion in 2021. Capital expenditure on helicopters stood at US\$57.7 million in 2016 and is forecast to post a CAGR of 4.6%, from US\$69.4 million in 2017 to US\$83.0 million in 2021 due to a demand for more medium-sized and heavy helicopters.

Air freight to grow in line with imports and exports

Freight recorded an annual growth rate of 22.7%, from 758.7 million ton-km in 2015 to 931.3 million ton-km in 2016. Freight carriage is forecast to post a CAGR of 2.0%, from 897.9 million ton-km in 2017 to 972.6 million ton-km in 2021.

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 passengers, air freight, deliveries of narrow%li%and wide-body aircraft, capital expenditure on single%li%and 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 Indonesian 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 Indonesian civil aerospace industry and their overview and product portfolio?

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

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

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

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