

Japan - Civil Aerospace: Progress towards an indigenous 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.

Japan has the world's third largest economy, and is the fifth leading country in Asia-Pacific in terms of nominal GDP. In 2012, the Japanese Government introduced an economic policy, Abenomics, which focuses on monetary easing, flexible fiscal policy, and structural reforms, thereby helping the country to register strong economic growth. For instance, the country's nominal GDP increased with a rate of 12.6%, from US\$4,382.4 billion in 2015 to US\$4,936.3 billion in 2016. The country is at the forefront of developing advanced technologies for local needs. It also focuses on co-developing products with foreign players to help create new businesses that will lead to self-reliant economic growth. Japan will also undertake various initiatives to advance its infrastructure projects in the coming years. The Japanese Government has announced several initiatives to increase airline capacities in order to meet the growing demand for the 2020 Tokyo Olympic Games. The country has leveraged its strong supplier base, which supports the manufacturing of civil aircraft through collaborations. Boeing is the leading provider of commercial jetliners to Japanese airlines.

KEY HIGHLIGHTS

Expansion initiatives to drive the number of air passengers

In Japan, the number of air passengers increased at a rate of 3.1%, from 114.1 million in 2015 to 117.7 million in 2016, and is forecast to increase at a CAGR of 4.0%, from 125.3 million in 2017 to 146.8 million in 2021, primarily due to government initiatives to expand the country's international and domestic routes. Service expansions by airline operators will also support growth. In July 2017, Vietjet partnered with Japan

Airlines to upgrade its offerings in order to improve its service quality.

Capital expenditure on aircraft to decline due to delayed deliveries

CAPEX on aircraft in Japan increased at a rate of 35.7%, from US\$3,516.0 million in 2015 to US\$4,771.1 million in 2016. Deliveries increased from 33 in 2015 to 46 in 2016, largely contributing to the segment's capital expenditure. However, it is forecast to decline at a CAGR of -1.8%, from US\$4,848.0 million in 2017 to US\$4,506.0 million in 2021, due to the anticipated delays in deliveries and the rising usage of used aircraft.

Increased deliveries of narrow-body aircraft to drive growth

In Japan, aircraft deliveries increased with a rate of 39.4% from 33 in 2015 to 46 in 2016, and are further forecast to increase at a CAGR of 1.8%, from 40 in 2017 to 43 in 2021. Demand for narrow-body aircraft, which are forecast to grow at a CAGR of 2.4% from 20 in 2017 to 22 in 2021, will significantly contribute to the growth of the segment.

SCOPE

Risk & Reward Index - The Risk & Reward index compares the position of Japan's civil aerospace industry with regards to other countries in the region in terms of specific risk and reward parameters.

Industry Snapshot and Industry View - Key civil aerospace industry statistics include deliveries, active fleet size, maintenance, repair and overhaul (MRO) expenditure, key industry segments, and the trends driving market performance in Japan's civil aerospace market.

Industry SWOT Analysis - Discover the strengths, weaknesses, opportunities and threats impacting market performance and the investments in Japan's civil aerospace market.

Industry Benchmarking - Benchmark how Japan's 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, air passengers, fleet age, and air freight.

Competitive Landscape - Overview of relevant players in Japan's 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 Japanese civil aerospace industry compared to other countries in the 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 Japanese civil aerospace industry and what is their overview and product portfolio?

What trends are being witnessed within Japan's civil aerospace industry?

What are Japan's civil aerospace industry's Strengths and Weaknesses and what Opportunities and Threats does it face?

What are the recent developments and innovations in Japan's civil aerospace industry?

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