

Mexico - Civil Aerospace: Expansion of low-cost carriers to fuel market 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 Mexican economy is closely aligned with that of Canada and the US under the North American Free Trade Agreement (NAFTA). The value of its bilateral trade with the US is close to half of its total GDP, with the US purchasing three quarters of its total exports. With President Trump in the White House, these bonds are likely to be strained. Mexico's aerospace industry is a vital engineering hub; over 320 Mexican firms offer aviation engineering services and equipment. Initially, aviation firms used Mexico as a cost-efficient location for assembly tasks, but due to the strategic importance of the US-Mexico border, it has since grown into a sophisticated manufacturer of aerospace fuselages and parts.

KEY HIGHLIGHTS

Increase in the frequency of flights and a reduction in fares to drive passenger volume

Passenger demand will drive the number of aircraft deliveries and active fleet size in Mexico. The volume of new aircraft deliveries reached 37.0 in 2016, representative of an annual growth rate of 68.2%. Volume is anticipated to post a forecast-period CAGR of 9.0%, to reach 48.0 in 2021. The active fleet size recorded an annual growth rate of 19.8%, rising from 278.0 in 2015 to 333.0 in 2016 and is anticipated to post a forecast-period CAGR of a CAGR of 10.1%, from 363.0 in 2017 to 533.0 in 2021.

Proliferation of new airlines and increased procurement to drive capital expenditure

Capital expenditure (CAPEX) on aircraft and related equipment grew at an annual rate of 5.0%, to reach US\$1.6 billion in 2016 and is expected to record a forecast-period CAGR of 0.7%, to reach US\$1.8 billion in 2021 owing to an increased procurements from airlines and aircraft leasing companies.

Opening of new manufacturing facility and emergence of new carriers to drive growth

The active fleet size recorded an annual growth rate of 19.8%, rising from 278.0 in 2015 to 333.0 in 2016 and is anticipated to post a forecast-period CAGR of a CAGR of 10.1%, from 363.0 in 2017 to 533.0 in 2021.

SCOPE

Risk & Reward Index - The Risk & Reward index compares the position of Mexico's Civil Aerospace with that of other countries in the region in terms of a set of specific risk and reward parameters.

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

Industry SWOT Analysis - Discover the strengths, weaknesses, opportunities and threats impacting the market's performance.

Industry Benchmarking - Benchmark how the Mexican Civil Aerospace industry market is performing against that of regional and global markets in terms of fleet size, deliveries, MRO expenditure, aircraft and helicopter capital expenditure, passenger volume, fleet age, and air freight.

Competitive Landscape - Overview of relevant players in the Mexican Civil Aerospace industry such as manufacturers, and airline operators, with each player subject to a process of peer review.

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 Mexican Civil Aerospace industry compared to other countries in North America?

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

Who are the leading players in the Mexican Civil Aerospace industry and their overview and product portfolio?

What trends are being witnessed within the Mexican Civil Aerospace industry?

What is the Mexican Civil Aerospace industry's Strengths and Weaknesses and what Opportunities and Threats does it face?

What are the recent developments and innovations in the Mexican Civil Aerospace industry?

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