

The Netherlands - Civil Aerospace: An MRO driven market (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.

According to the Global Competitiveness Report 2016-17, the Netherlands ranks fourth, representing the country's stability and global competitiveness. The country was ahead of major economies such as Sweden (sixth), the UK (seventh) and France (21st) on this parameter. Moreover, the country ranks third in terms of infrastructure in Western Europe. Its well established infrastructure, paired with government regulations, promote foreign investment and entrepreneurial activity. Moreover, the country has a business-friendly regulatory environment which is responsible for monitoring and enforcing fair competition within the market. In 2016, the country's aviation industry accounted for US\$5.4 billion revenue with 16,000 jobs. Civil aviation contributed 75% out of which 56% was contributed by MRO.

KEY HIGHLIGHTS

Business and leisure tourism drives number of air passengers

In the Netherlands, number of air passengers increased at 8.0% in 2016 from 34.9 million in 2015 to 37.7 million in 2016. This is forecast to grow at 3.4% CAGR from 38.5 million in 2017 to 44.0 million in 2021, primarily attributed to the increasing number of domestic and international tourists for business and leisure purposes.

Aircraft capital expenditure to increase in the forecast period

Aircraft capital expenditure increased at a growth rate of 10.9% from US\$875.0 million in 2015 to US\$970.0 million in 2016 and is expected to increase at 1.4% CAGR over 2017-2021 from US\$1,000.0 million in 2017 to US\$1,058.0 million in 2021, due to the increased procurement of single aisle aircraft and major deliveries made by Embraer.

Deliveries to increase in the forecast period

The number of deliveries increased by 33.3% from three in 2015 to four in 2016 and is expected to increase at 4.7% CAGR from five in 2017 to six in 2021, due to the increase in the number of narrow body deliveries.

SCOPE

Risk & Reward Index - The Risk & Reward index compares the position of the Dutch Civil Aerospace vis-?-vis other countries in the region in terms 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 in the Dutch civil aerospace market.

Industry SWOT Analysis - Discover the Strengths, Weaknesses, Opportunities and Threats impacting market performance and investment in the Dutch civil aerospace market.

Industry Benchmarking - Benchmark how the Dutch 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 the Dutch 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 Dutch 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 Dutch civil aerospace industry and their overview and product portfolio?

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

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

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

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