

Nigeria - Civil Aerospace: Economic decline limiting 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.

Over the past ten years, Nigeria has been undergoing major economic transformations, progressing from a disarticulated economy to an articulated economy. This transformation has led to the country becoming one of the fastest growing economies in Africa and the Middle East. The Nigerian Civil Aviation Authority (NCAA) has a multiple entry point bilateral air services agreement with 78 countries, which allows the airline operators of these countries to dominate the Nigerian air passenger traffic on long haul routes. This is leading to a decline in the ease of doing business for air carriers based in Nigeria.

KEY HIGHLIGHTS

Aircraft deliveries are expected to remain low, Billing amount to increase

The decline in number of air passengers is affecting new aircraft deliveries in Nigeria. However, the number of deliveries of new aircraft is expected to increase from one in

2017 to two in 2021 and all the aircraft in the forecast period are estimated to be narrow bodied aircraft owing to lesser cost as compared to wide body aircraft. The billing against delivery of new aircraft in Nigeria is expected to increase at 14.3% CAGR from US\$59.1 million in 2017 to US\$101.2 million in 2021.

Demand for light helicopter to drive helicopter capex growth

Capital expenditure on helicopters in Nigeria witnessed a decline from US\$39 million in 2015 to US\$11 million in 2016. However, it is expected to increase at 3.3% CAGR during 2017-21 from US\$11.4 million in 2017 to US\$13 million in 2021. Increased demand for light helicopters will drive the overall capital expenditure growth for civil helicopters. Light helicopter capital expenditure is expected to increase at 4.6% CAGR from US\$6 million in 2017 to US\$7 million in 2021.

Procurement of used narrow body aircraft leading to an increase in the active fleet size

The active fleet size of aircraft in Nigeria witnessed a growth of 8.6% from 58 aircraft in 2015 to 63 aircraft in 2016. Active fleet is further expected to increase at 9.7% CAGR from 71 in 2017 to 103 in 2021, with leasing and purchasing of narrow body aircraft by airline carriers in order to expand their operation. The number of narrow body aircraft registered a 7% growth between 2015 and 2016 from 57 in 2015 to 61 in 2016 and is expected to increase at 9.3% CAGR from 70 in 2017 to 100 in 2021.

SCOPE

Risk & Reward Index - The Risk & Reward index compares the position of the Nigeria's 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 Nigerian Civil Aerospace market.

Industry SWOT Analysis - Discover the Strengths, Weaknesses, Opportunities and Threats impacting market performance and investment in the Nigerian Civil Aerospace market.

Industry Benchmarking - Benchmark how the Nigerian 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 Nigerian 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 Nigerian Civil Aerospace industry compared to other countries in Middle East and Africa?

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

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

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

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

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

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