

Poland - Civil Aerospace: Air passengers and freight growth hold promise (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.

Poland is a member of the North Atlantic Alliance and the European Union (EU) and it is these strong trade ties that supported the growth in Poland's air freight carriage. Many global players are looking to establish new facilities in Poland that will enhance the country's manufacturing and maintenance base. Due to growing demand in terms of air passengers and freight, airline operators are focusing on the procurement of new and used aircraft. Moreover, demand for low-cost carriers on regional routes is driving the procurement of narrow-body aircraft by service providers.

KEY HIGHLIGHTS

Increase in disposable incomes to drive air passenger growth

In Poland, air passengers registered a growth rate of 22.7% in 2016, from 4.4 million in 2015 to 5.5 million. It is forecast to increase at a CAGR of 1.9%, from 5.3 million in 2017

to 5.7 million in 2021. The increase can be attributed to growth in terms of disposable income (average household disposable income increased from US\$18651.7 in 2014 to US\$19363.9 in 2015) and the frequency of transatlantic and regional flights.

The increased procurement of new aircraft and proliferation of new airlines is expected to drive capital expenditure

In Poland, capital expenditure on aircraft stood at US\$163.0 million in 2016 and it is forecast to witness a CAGR of -13.6%, from US\$178.0 million in 2017 to US\$99.2 million in 2021. This is due to the expected decrease in capital expenditure on single aisle aircraft, which is expected a decline from US\$118.0 million in 2017 to US\$52.0 million in 2019, due to the rising use of used aircrafts.

New aircraft delivery growth is expected to be low

In Poland, there were no deliveries in 2015 and 2016 owing to the lease of used aircraft by Polish airlines. However, the number of deliveries is forecast to increase at a CAGR of 10.7%, from four deliveries in 2017 to six deliveries in 2021, owing to the procurement of new aircraft. For instance, in January 2017, LOT Polish Airlines entered into an agreement with Aviation Capital Group to take delivery of the first out of three new Boeing 787-9's.

SCOPE

Risk & Reward Index - The Risk & Reward index compares the position of the Polish 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 Polish civil aerospace market.

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

Industry Benchmarking - Benchmark how the Polish 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 Polish 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%li%and wide-body aircraft, capital expenditure on single aisle, twin aisle, regional, business jets and cargo aircraft, fleet age, capital expenditure on helicopters, MRO expenditure and billing?

How risky is it to invest in the Polish 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 Polish civil aerospace industry and what is their product portfolio?

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

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

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

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