

# Russia - Civil Aerospace: Improving economic conditions to drive 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.

Russia is a key market for aviation services. After decades of restrictions on international travel during the Soviet period (which dissolved in 1991), many Russians are now using the opportunity to travel abroad for business and tourism purposes. In order to cater to high demand, the development of aviation infrastructure has been a key focus area for the Russian aviation industry; the number of airports in Russia increased from 1,218 in 2013 to 1,260 in 2016. The major airlines of the country are also planning to acquire more domestic routes. The civil aviation regulatory body, State Civil Aviation Authority of Russia (SCAA), is responsible for the management of governmental services related to civil aviation, usage of air space over Russia, the registration of aircraft, and maintaining state registers of civil aircraft, airdromes, and airports.

### KEY HIGHLIGHTS

### Demand for passenger aircraft to drive growth of the active fleet size

The active fleet size increased with a rate 23.5%, from 527 aircraft in 2015 to 651 aircraft in 2016, and is forecast to increase at a CAGR of 10.3%, from 712 aircraft in 2017 to 1,052 aircraft in 2021. Growth in the active fleet size is largely due to the rise in the number of air passengers, which led airline operators to procure more aircraft.

### Increased trade volume to drive growth freight

Freight increased with a rate of 23.1%, from 4,761.0 million ton-km in 2015 to 5,863.2 million ton-km in 2016, and is forecast to increase at a CAGR of 5.4%, from 5,739.9 million ton-km in 2017 to 7,096.0 million ton-km in 2021. This is primarily due to improved air cargo carriage capacity attributed to the development of new cargo terminals and improved infrastructure, along with trade ties between nations.

### Capital expenditure to recover owing to increased demand

Capital expenditure on aircraft in Russia declined from US\$9,299.0 million in 2015 to US\$2,720.0 million in 2016. However, it is forecast to increase at a CAGR of 5.7%, from US\$3,119.0 million in 2017 to US\$3,894.0 million in 2021. High demand will drive the procurement of aircraft and related equipment in Russia, in turn further driving capital expenditure on aircraft.

## SCOPE

**Risk & Reward Index** - The Risk & Reward index compares the position of the Russian Civil Aerospace 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 and maintenance, repair and overhaul (MRO) expenditure, key industry segments, and the trends driving market performance in the Russian civil aerospace market.

**Industry SWOT Analysis** - Discover the Strengths, Weaknesses, Opportunities, and Threats impacting market performance and investments in the Russian civil aerospace market.

**Industry Benchmarking** - Benchmark how the Russian 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 Russian 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 the helicopter, MRO expenditure, and billing?

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

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

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

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

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