

Saudi Arabia - Civil Aerospace: Liberalization and increasing demand to drive expenditure (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.

Saudi Arabia, an oil-based economy, is one of the largest economies in the Middle East. Oil accounts for 42.0% of the country's GDP. Its nominal GDP decreased from US\$650.0 billion in 2015 to US\$639.7 billion in 2016 due to a decline in oil prices. However, it is expected to reach US\$814.6 billion in 2021, driven by increased investments in the private sector to offset its dependence on oil. Saudi Arabia's civil aviation regulator, General Authority of Civil Aviation (GACA), controls the civil aviation industry in the country. The government has undertaken several initiatives to make the country's business environment conducive to investments; "Saudi Vision 2030", which was launched in April 2016, is aimed at increasing foreign investment and enhancing overall competitiveness.

KEY HIGHLIGHTS

Rise in the number of air passengers

As a result of increasing demand on international routes, the number of air passengers in Saudi Arabia increased at a rate of 5.3%, from 32.8 million in 2015 to 34.6 million in 2016, and is forecast to increase at a CAGR of 5.6%, from 37.5 million in 2017 to 46.6 million by 2021.

Aircraft deliveries and billing are expected to increase

In Saudi Arabia, the number of aircraft deliveries increased from eight in 2015 to 21 in 2016, and is forecast to increase at a CAGR of 10.0%, from 15 in 2017 to 22 in 2021. This is primarily due to the expected procurement of wide-body aircraft by airline operators, such as Saudi Arabian Airlines, in order to commence operations on new long haul routes. It is also expected to lead to a subsequent increase in billing. Billing against deliveries in Saudi Arabia increased from US\$673.2 million in 2015 to US\$1,644.2 million in 2016, and is forecast to increase at a CAGR of 10.0%, from US\$1,178.4 million in 2017 to US\$1,730.6 million in 2021

Rise in aircraft capital expenditure

Growth in the number of air passengers is driving aircraft deliveries as airline operators look to procure more aircraft in order to satisfy high passenger demand and launch new services to attract more customers. Similarly, due to the rise in the number of deliveries, CAPEX on aircraft has also risen. Aircraft capital expenditure stood at US\$440.0 million in 2016 and is forecast to increase at a CAGR of 5.9%, from US\$545.0 million in 2017 to US\$685.0 million in 2021.

SCOPE

Risk & Reward Index - The Risk & Reward index compares the position of the Saudi Arabia's 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, maintenance, repair and overhaul (MRO) expenditure, key industry segments and the trends driving market performance in the Saudi Arabian Civil Aerospace market.

Industry SWOT Analysis - Discover the Strengths, Weaknesses, Opportunities and Threats impacting market performance and investments in the Saudi

Arabian Civil Aerospace market.

Industry Benchmarking - Benchmark how the Saudi Arabian 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 Saudi Arabian 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 Saudi Arabian 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 Saudi Arabian Civil Aerospace industry and what is their overview and product portfolio?

What trends are being witnessed within the Saudi Arabian Civil Aerospace industry?

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

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

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