

South Africa - Civil Aerospace: Increasing passenger numbers driving growth (Strategy, Performance and Risk Analysis)

<https://marketpublishers.com/r/SBBAA6B9BE3EN.html>

Date: December 2017

Pages: 73

Price: US\$ 1,995.00 (Single User License)

ID: SBBAA6B9BE3EN

Abstracts

South Africa - Civil Aerospace: Increasing passenger numbers driving growth (Strategy, Performance and Risk Analysis)

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.

South Africa's nominal GDP decreased from US\$396.7 billion in 2012 to US\$289.2 billion in 2016. This was due to a decline in private investments and consumption, a fall in public investment, and a reduction in exports. However, it will reach US\$328.7 billion in 2021. According to the Budget 2017, over the next three years, the government will spend US\$37.5 billion on social grants, US\$8.8 billion on subsidized public housing, US\$10.8 billion to support affordable public transport and US\$7.2 billion on water resources and bulk infrastructure. South Africa has modern and well-developed transport infrastructure, the country is home to the continent's largest air network. The country's 10 airports handle 98% of its commercial traffic, through 200,000 aircraft arrivals and 10 million passenger departures annually.

KEY HIGHLIGHTS

Increase in the number of air passengers has led to increases in capital expenditure

As a result of the increasing demand on international routes, the number of air passengers grew at 5.5% from 18.5 million in 2015 to 19.5 million in 2016, and is expected to increase at 2.0% CAGR from 19.5 million in 2017 to 20.6 million in 2021. This increase in the number of air passengers is driving the aircraft capital expenditure as airline operators look to procure more aircraft in order to satisfy increasing passenger demand, and start new services to attract more customers. Aircraft capital expenditure stood at US\$440 million in 2016 and is expected to increase at 5.9% CAGR from US\$545 million in 2017 to US\$685 million in 2021.

Procurement of used aircraft will lead to increases in the active fleet size

In South Africa, the active fleet size increased at 11.1% from 198 in 2015 to 220 in 2016 and it is expected that it will increase at 7.8% CAGR from 237 in 2017 to 320 in 2021. The expected increase in the active fleet size is primarily attributed to the increased procurement and leasing of used aircraft under fleet expansion and modernization initiatives by operators, in order to increase flight frequency on profitable routes and start new services on long haul routes

Operational expenditure will decline while MRO expenses are expected to increase

In South Africa, operational expenditure declined at 19.3% from US\$2,772.9 million in 2015 to US\$2,237.5 million in 2016 and is expected to continue declining at -6.1% CAGR from US\$2,418.1 million in 2017 to US\$1,879.6 million in 2021. The decline in the operational expenditure is primarily due to the pay cuts imposed by South African Airlines, the country's largest airline on its employees. Due to the increase in the number of aircraft in the advanced age groups (more than 20 years), MRO expenditure increased at 6.5% from US\$352 million in 2015 to US\$375 million in 2016, and this is expected to continue increasing at 0.5% CAGR from US\$352.6 million in 2017 to US\$360.1 million in 2021.

SCOPE

Risk & Reward Index - The Risk & Reward index compares the position of the South Africa'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 South African Civil Aerospace market.

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

Industry Benchmarking - Benchmark how the South African 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 South African 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 South African 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 South African Civil Aerospace industry and their overview and product portfolio?

What trends are being witnessed within the South African Civil Aerospace industry?

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

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

Contents

Risk and Reward Index
Industry Snapshot
Industry View
Industry SWOT Analysis
Industry Benchmarking
Industry Performance
Competitive Landscape
Deals
Key Developments
Appendix

I would like to order

Product name: South Africa - Civil Aerospace: Increasing passenger numbers driving growth (Strategy, Performance and Risk Analysis)

Product link: <https://marketpublishers.com/r/SBBAA6B9BE3EN.html>

Price: US\$ 1,995.00 (Single User License / Electronic Delivery)

If you want to order Corporate License or Hard Copy, please, contact our Customer Service:

info@marketpublishers.com

Payment

To pay by Credit Card (Visa, MasterCard, American Express, PayPal), please, click button on product page <https://marketpublishers.com/r/SBBAA6B9BE3EN.html>

To pay by Wire Transfer, please, fill in your contact details in the form below:

First name:
Last name:
Email:
Company:
Address:
City:
Zip code:
Country:
Tel:
Fax:
Your message:

****All fields are required**

Customer signature _____

Please, note that by ordering from marketpublishers.com you are agreeing to our Terms & Conditions at <https://marketpublishers.com/docs/terms.html>

To place an order via fax simply print this form, fill in the information below and fax the completed form to +44 20 7900 3970

