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Spain - Civil Aerospace: Increase in passenger volumes to drive aircraft deliveries (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.

In terms of nominal GDP, Spain is the fifth-largest economy in Western Europe. The country's nominal GDP stood at US$1.2 trillion in 2016 and is anticipated to post a CAGR of 4.0% CAGR to reach US$1.5 trillion by 2021. Political instability and unrest over the independence of Catalonia are undermining investor confidence in the economy. Catalonia, which is highly developed in terms of infrastructure, makes a large-scale contribution to Spain's GDP. Continued protests in the region will therefore have an adverse effect on economic growth. Agencia Estatal de Seguridad A?rea is the civil aviation regulatory body responsible for the supervision, inspection and coordination of air transport. It also involved in the detection, evaluation and mitigation of any security risks associated.

KEY HIGHLIGHTS

Increasing disposable income to drive passenger volumes

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The volume of passengers increased at growth rate of 10.1%, from 60.6 million in 2015 to 66.7 million in 2016 and is forecast to post a CAGR of 4.5%, from 66.1 million in 2017 to 78.9 million in 2021. A rise in household income - which recorded a growth rate of 0.5% in 2014, followed by 2.1% in 2015 - and a decline in the country's unemployment rate will positively contribute.

Aircraft capital expenditure to decline over the forecast period

Capital expenditure on aircraft in Spain stood at US$1.8 billion in 2016 and is expected to post a CAGR of -1.6%, from US$2.0 billion in 2017 to US$1.9 billion in 2021. However, an increase in the demand for airline services will propel the procurement of aircraft and related equipment. This will float capital expenditure until 2020.

Deliveries to increase over the forecast period

In Spain, the number of aircraft deliveries rose from 20 units in 2015 to 36 in 2016. The number of deliveries is expected to increase at a CAGR of 8.9%, from 32 units in 2017 to 45 in 2021. Passengers volumes will drive deliveries. Airbus accounted for the most deliveries, rising at a rate of 16.7%, from 18 in 2015 to 21 in 2016.

SCOPE

Risk & Reward Index - The Risk & Reward index compares the French civil aerospace industry with other countries in Europe on specific risk and reward parameters.

Industry Snapshot and Industry View - Key civil aerospace industry statistics includes deliveries, active fleet size, maintenance, repair and overhaul (MRO) expenditure, key industry segments and the trends driving market performance in the French civil aerospace market.

Industry SWOT Analysis - Discover the strengths, weaknesses, opportunities and threats impacting market's performance.

Industry Benchmarking - Benchmark how the French civil aerospace industry is performing compared to regional and global markets in terms of fleet size, deliveries, MRO expenditure, aircraft and helicopter CAPEX, passenger volumes, fleet age, and air freight.

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Competitive Landscape - Overview of relevant players in the French civil aerospace industry such as manufacturers, and airline operators, with each player in the relevant category compared against its peers in terms of a set 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 airframes, twin-aisle airframes, regional, business jets and cargo aircraft, fleet age, capital expenditure on helicopter, MRO expenditure and billing?

How risky is it to invest in the Spanish 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 Spanish Civil Aerospace industry and their overview and product portfolio?

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

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

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

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