

# Sweden - Civil Aerospace: A capital and personnel intensive industry (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.

Sweden's GDP growth has been stimulated by increases in investments and exports, along with a rebound in government spending. The central bank's initiative to cut interest rates in 2016 has affected the economy positively. Lower interest rates will lead to increases in individuals' spending and investments. According to the 2017 Index of Economic Freedom, Sweden was ranked 19th out of 186 economies. On the other hand, according to the World Bank, Sweden was ranked 10th out of 190 countries in terms of ease of doing business. Sweden's transparent and efficient regulatory environment promotes strong entrepreneurial activity. The Swedish Civil Aviation Administration (SCAA) is a state owned organization responsible for the civil aviation administration in Sweden.

### KEY HIGHLIGHTS

Increase in number of air passengers

An increasing number of long haul routes and the growing demand for passenger routes could lead to an increase in the number of seats available, seats sold, passenger revenue, the number of air passengers and active fleet size. The capital expenditure stood at US\$80.0 million in 2016 and is forecast to decline at -2.1% CAGR from US\$100.0 million in 2017 to US\$85.0 million in 2021. The decline is attributed to the decrease in capital expenditure on regional aircraft.

Available seat kilometers (ASKs) to increase further

ASKs in Sweden increased at a growth rate of 1.1% from 47.7 billion in 2015 to 48.2 billion in 2016 and are forecast to increase at 1.8% CAGR from 49.7 billion in 2017 to 53.4 billion in 2021. The expected growth is primarily due to the increase in the frequency of flights on major domestic and international routes as well as the growth in aircraft fleet size.

MRO expenditure to increase

MRO expenditure grew by 17.6% from US\$326.9 million in 2015 to US\$384.4 million in 2016. Similarly, it is forecast to increase at 1.3% CAGR from US\$371.6 million in 2017 to US\$391.9 million in 2021. The increase in MRO expenditure is primarily due to the fleet modernization and overhauling initiatives undertaken by major airlines in the country necessitated by the increasing average age of the fleet.

## SCOPE

**Risk & Reward Index** - The Risk & Reward index compares the position of the Swedish civil aerospace industry 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 Swedish civil aerospace market.

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

Industry Benchmarking - Benchmark how the Swedish 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 Swedish 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 Swedish 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 Swedish civil aerospace industry and their overview and product portfolio?

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

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

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

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