

# Thailand - Civil Aerospace: Government initiatives driving growth (Strategy, Performance and Risk Analysis)

<https://marketpublishers.com/r/T636AD4AC9BEN.html>

Date: December 2017

Pages: 75

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

ID: T636AD4AC9BEN

## 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.

Thailand's nominal GDP posted an annual growth rate of 2.0%, from US\$399.2 billion in 2015 to US\$407.0 billion in 2016. However, the country recorded a decline in nominal GDP in both 2014 and 2015 primarily due to a slowdown in exports and political instability arising out of anti-government protests. In the civil aerospace sector, Thailand majorly depends on the import of aircraft and related equipment. However, the government is committed to making the country a destination for aircraft maintenance. In April 2017, Thailand Board of Investment's New York office announced the execution of a 15-year aerospace sector development plan intended to develop and strengthen country's position as next regional aviation and MRO hub in the Southeast Asia.

### KEY HIGHLIGHTS

Launch of new routes by the air carriers to drive the number of air passengers

In Thailand, the number of air passengers increased at growth rate of 9.0% between 2015 and 2016 from 55.4 million in 2015 to 60.5 million in 2016 and is expected to increase at 7.8% CAGR over 2017-2021 from 66.0 million in 2017 to 89.2 million in 2021. The increase in the number of air passengers can be primarily attributed to the increasing number of International tourists and the launch of new routes from Thailand

Aircraft capital expenditure to decline in the forecast period

In Thailand, the aircraft capital expenditure declined at a rate of -56.2% from US\$1,210.0 million in 2015 to US\$530.0 million in 2016 and is expected to decline at -30.1% CAGR over 2017-2021 from US\$630.0 million in 2017 to US\$150.0 million in 2021. The decline in the capital expenditure is primarily attributed to the decrease in the capital expenditure on twin aisle aircraft.

Deliveries to increase in the forecast period

In Thailand, the number of deliveries declined at a rate of -11.1% from 18 in 2015 to 16 in 2016 and is expected to increase at 6.5% CAGR between 2017 and 2021 from 21 in 2017 to 27 in 2021. The expected increase in the number of deliveries is primarily due to the increase in the number of narrow body deliveries.

## SCOPE

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

**Industry SWOT Analysis** - Discover the strengths, weaknesses, opportunities and threats impacting market performance and investment in the Thai civil aerospace market.

**Industry Benchmarking** - Benchmark how the Thai 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 Thai 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 Thai civil aerospace industry compared to other countries in Asia-Pacific region?

What is driving the performance of key industry segments such as deliveries, fleet size and MRO expenditure?

Who are the leading players in the Thai civil aerospace industry and their overview and product portfolio?

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

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

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

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