

# Turkey - Civil Aerospace: Increasing numbers of passengers will drive growth (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.

Turkey is one of the largest economies in Central and Eastern Europe. However, the economy has been adversely affected by political unrest and number of terrorist attacks. The country's nominal GDP declined at an annual rate of -0.2%, from US\$624.3 billion in 2015 to US\$623.2 billion in 2016. Failed coup attempts, a political row with Russia, and on-going conflicts with Kurdish separatists and Islamic State (IS) cumulated to enhance the risk of doing business in Turkey. Turkey's legal framework remains a cause of concern due to high rates of taxation. The Directorate General of Civil Aviation acts as the regulatory body for the Turkish civil aerospace industry. The Turkish civil aerospace sector is growing rapidly. Infrastructure development and progress towards liberalization are driving growth in the industry. As a growing economy with young population, Turkey has high potential for growth in airline services. The country has the highest number of air passengers in Central and Eastern Europe. To cater to the increase in the air passengers, the demand for new aircraft is also increasing.

## KEY HIGHLIGHTS

Steady economic growth, a young population, and a liberalized market to drive passenger volume

In Turkey, passenger volume increased at an annual rate of 3.9%, from 96.6 million in 2015 to 100.4 million in 2016. Volume will post a CAGR of 7.7%, to rise from 113.2 million in 2017 to 152.6 million in 2021 due to economic growth, a young population, and liberalized markets. Discounts in airport services, landing and passenger fees, and tax reductions on ticket fares, will cause the volume of passengers to surge.

Aircraft capital expenditure to increase over the forecast period

Turkey's capital expenditure on aircraft recorded an annual rate of 8.3%, from US\$2,525.0 million in 2015 to US\$2,735.0 million in 2016. It is forecast to post a CAGR of 3.9%, from US\$3,115.0 million in 2017 to US\$3,635.0 million in 2021. Growth will be supported by an increase in aircraft and equipment procurements by airlines and leasing companies.

Deliveries to increase over the forecast period

Aircraft deliveries recorded an annual growth rate of 44.2%, from 43 deliveries in 2015 to 62 in 2016. Deliveries are forecast to post a CAGR of 7.1%, from 51 in 2017 to 67 in 2021. The increase will be due to the launch of new routes coupled with a demand for more technologically advanced and fuel efficient aircraft.

## SCOPE

**Risk & Reward Index** - The Risk & Reward index compares the position of the Turkish Civil Aerospace with that of 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 Turkish civil aerospace market.

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

aerospace market.

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

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

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

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

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