

United Kingdom - Civil Aerospace: International travel leading to demand for aircraft (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.

As the World Bank's 'Governance Indicators, 2017' illustrate, the United Kingdom is one of the most successful nations in terms of application of the rule of law, control of corruption, government effectiveness, regulatory quality and had a high percentile rank of 92.79 in terms of government effectiveness in 2016. The country is one of the largest economies in Europe and exhibits high standard of living. Among the European nations, the UK has one of the highest levels of GDP per capita in terms of purchasing power parity. According to the World Bank's Ease of Doing Business Report 2017, the UK ranks as the seventh best country in the world, providing a supportive environment for doing business. In the Brexit referendum held in June 2016, the country voted to leave the EU. The economy has entered into an era of uncertainty since the Brexit referendum. It will affect the UK's future trade, impacting the performance of different sectors including the aviation industry.

KEY HIGHLIGHTS

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Increase in disposable income to drive the number of air passengers

With an increase in disposable income, preference towards air travel for business and leisure is also expected to increase in the UK. The number of air passengers increased at a 10.3% CAGR, from 131.5 million in 2015 to 145.1 million in 2016 and is further estimated to increase at a 4.1% CAGR, from 146.7 million passengers in 2017 to reach 172.1 million by 2021.

Aircraft capital expenditure to decline in the forecast period

the collapse of Monarch Airlines in October 2017 along with the decline in economic activities post the Brexit vote will result in a fall of aircraft capital expenditure. Capital expenditure on aircraft stood at US\$6,019.6 million in 2016 but this is expected to decline at a -1.3% CAGR, from US\$6,836.4 million in 2017 to US\$6,489.1 million in 2021.

Deliveries to increase in the forecast period

The total number of new aircraft deliveries declined at a -7.5% CAGR, from 53 units in 2015 to 49 in 2016, and is estimated to increase at a 5.4% CAGR, from 55 deliveries in 2017 to 68 aircraft deliveries in 2021 with more focus on wide-body aircraft. The number of wide-body aircraft deliveries is estimated to increase at a 10.7% CAGR, from 24 aircraft in 2017 to 36 in 2021.

SCOPE

Risk & Reward Index - The Risk & Reward index compares the position of the UK 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 UK civil aerospace market.

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

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

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

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

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

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