

United Kingdom - Transport and Logistics: Innovation driven industry (Strategy, Performance and Risk Analysis)

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Abstracts

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SUMMARY

The UK has broad transportation infrastructure involving road, rail, air, water and IT support for the transport system. It ranks higher than its regional counterparts - Italy, Germany, Sweden and Spain. In terms of infrastructure, the country's rank on the Logistics Performance Index rose from sixth in 2014 to fifth in 2016, ahead of Switzerland, France, Italy and Spain which respectively ranked seventh, 15th, 19th and 25th. Extensive infrastructure is largely supported by government investments that aim to improve road, rail and major airports. These infrastructure developments support increasing freight and passenger traffic in the UK, which drive the performance of the sector. The UK's future trade, which will be impacted by Brexit, will affect the performance of different sectors, including the aviation industry.

MarketLine's Premium industry reports provide a comprehensive overview of the market and include sections on: risk and reward, key industry trends and drivers, SWOT analysis, competitive landscape, innovation, deals, key developments, and industry benchmarking to compare key performance indicators with regional and global markets.

Key highlights

Growth in transportation to drive GVA

In the UK, total GVA from the transportation and logistics industry recorded a CAGR of 0.9%, rising from US\$99.6bn in 2012 to US\$104.2bn in 2017. It is projected to post a CAGR of 4.1%, from US\$110.2bn in 2018 to US\$129.3bn by the end of forecast period. An increase in air, rail and road transport will help to drive the industry's GVA.

Increase in freight volume to drive air freight traffic

In the UK, total air freight traffic registered a CAGR of -1.5%, falling from 6,243.5 million ton km in 2012 to 5,793.4 million ton km in 2017. However, it is projected to rise at a CAGR of 4.1% over the forecast period, from 5,997.1 million ton km in 2018 to 7,053.8 million ton km by 2022. The growth in freight volume is anticipated to drive air freight volume.

High demand for air travel to drive fleet growth

The active fleet size of aircraft in the UK recorded a CAGR of 9.7%, from 614 units in 2012 to 975 in 2017. It is projected to post a CAGR of 6.6%, rising from 1,049 aircraft in 2018 to 1,357 in 2022. Increasingly, both passengers and freight companies prefer to use air as a medium of transportation, which accounts for the increase in the country's active fleet size.

SCOPE

Risk & Reward Index: The Risk & Reward index compares the position of the UK's transport and logistics industry with other countries in the region in terms of specific risk and reward parameters.

Industry Snapshot and Industry View: Key transport and logistics industry statistics include freight traffic, freight volume, fleet size, passengers, import and export gross value added, FDI and trends driving market performance.

Industry SWOT Analysis: Discover the strengths, weaknesses, opportunities and threats impacting market performance and investment in the UK's transport and logistics market.

Industry Benchmarking: Benchmark how the UK transport and logistics market is performing compared to regional and global markets in terms of GVA, fleet size and freight traffic by mode.

Competitive Landscape: Overview of industry players compared to their peers across a set of indicators.

REASONS TO BUY

How is the market performing in terms of indicators such as freight traffic, freight volume, fleet size, passengers, import and export, gross value added and FDI?

How risky is it to invest in the UK transport and logistics industry compared to other countries in Europe?

What is driving the performance of key industry segments such as land, air, water and rail?

Who are the leading players in the UK transport and logistics industry and what is their presence in the respective segments?

What trends are being witnessed within the UK transport and logistics industry?

What are the UK transport and logistics industry's strengths and weaknesses and what opportunities and threats does it face?

What are the recent developments and innovations in the UK transport and logistics industry?

Contents

Risk and Reward Index
Industry Snapshot
Industry View
Industry SWOT Analysis
Industry Benchmarking
Industry Performance
Competitive Landscape
Innovation
Deals
Key Developments
Appendix

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