

Aerospace Industry (Industrial Report) - UK - November 2014

Report Price: £995.00 | \$1611.35 | €1263.96

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.



“With the growing involvement of the government the UK aerospace industry is preparing itself for the long battle ahead to retain its position as the leading industry in Europe and the second largest globally, behind only the US. The main competition globally will come from emerging markets, like those in the Asia-Pacific.”
— Lewis Cone, Research Analyst

This report looks at the following areas:

- What are the key determinants driving the aerospace industry?
- Was the market affected by the financial crisis and how has it recovered since? Has there been any structural changes as a consequence?
- How has the government influenced and shaped the development of the sector?
- What are the key issues the UK industry needs to address to maintain its global position in an ever-competitive market?
- How have companies adapted to cost and environmental pressures?
- What does the future hold for the UK's aerospace industry?

**BUY THIS
REPORT NOW**

VISIT:
store.mintel.com

CALL:
EMEA
+44 (0) 20 7606 4533

Brazil
0800 095 9094

Americas
+1 (312) 943 5250

APAC
+61 (0) 2 8284 8100

EMAIL:
reports@mintel.com

DID YOU KNOW?

This report is part of a series of reports, produced to provide you with a more holistic view of this market

Aerospace Industry (Industrial Report) - UK - November 2014

Report Price: £995.00 | \$1611.35 | €1263.96

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

Table of Contents

Executive Summary

Market Size

Figure 1: UK Turnover of Aerospace Equipment, 2009-2013, (£ Billion at MSP)

Figure 2: UK Turnover of Aerospace Equipment, by sector, 2009-2013, (£ Billion at MSP)

Market trends

Figure 3: Regional Analysis of Global Air Passenger Traffic Development, Five-Year Average, (% Change in RPK)

Figure 4: Forecast Development of the Global Airline Fleet, by Aircraft Type, 2013 and 2033, (% of Total)

Figure 5: UK Defence Departmental Expenditure Limits and Defence Spending, 2009/10-2013/14, (£ Million)

International trade

Figure 6: UK Imports of Aerospace Equipment, 2009-2013, (£ Million at CIF)

Figure 7: UK Exports of Aerospace Equipment, 2009-2013, (£ Million at FOB)

Market factors

Emerging economies will provide the biggest supply of additional international passengers, increasing demand for aerospace equipment

The development of new aircraft to increase fleet size or to replace older models is under strain

Low-cost carriers are becoming more dominant in the industry due to the ongoing economic fragility in many regions

Companies

Forecast

The number of mainline jet deliveries is forecast to exceed 30,000 over the next two decades

Figure 8: Forecast World Mainline Jet Deliveries, by Type, 2014-2033, (Number)

Asia Pacific expected to consolidate its position as the region with the largest airplane fleet between 2013 and 2033

Figure 9: Forecast World Airplane Fleet, by Region, 2013 and 2033, (% of Total)

Defence expenditure limits predicted to marginally decline until 2016 at the earliest

Figure 10: Forecast UK DEL on Defence, 2013/14-2015/16, (£ Million)

What we think

Introduction

Definitions

Methodology

Abbreviations

Market positioning

UK Economy

Key points

Overview

Inflation

Manufacturing

Business investment

Imports

BUY THIS
REPORT NOW

VISIT: store.mintel.com

CALL: EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094

Americas +1 (312) 943 5250 | APAC +61 (0) 2 8284 8100

EMAIL: reports@mintel.com

Aerospace Industry (Industrial Report) - UK - November 2014

Report Price: £995.00 | \$1611.35 | €1263.96

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

Exports

Market Factors

Key points

UK Turnover and Market Trends

Key points

- Figure 11: UK turnover of aerospace equipment, 2009-13, (£ Billion at MSP)
- Figure 12: UK Turnover of Aerospace Equipment, 2009-2013, (£ Billion at MSP)
- Figure 13: UK turnover of aerospace equipment, by sector, 2009-13, (£ Billion at MSP)
- Figure 14: UK Turnover of Aerospace Equipment, by sector, 2009-13, (£ Billion at MSP)

Market Trends

Key points

Civil aerospace

- Figure 15: Regional Analysis of Global Air Passenger Traffic Development, 2010 - 2014, (% Change)
- Figure 16: Regional Analysis of Global Air Passenger Traffic Development, 2010-2014*, FiveYear Average, (% Change in RPK)
- Figure 17: Forecast Development of the Global Airline Fleet, by Aircraft Type, 2013 and 2033, (Number of Aircraft)
- Figure 18: Forecast Development of the Global Airline Fleet, by Aircraft Type, 2013 and 2033, (% of Total)
- Figure 19: World Mainline Jet Deliveries, by Model and Manufacturer, 2000, 2010-2013 and partial-Year 2014, (Number)
- Figure 20: World Mainline Jet Deliveries, by Manufacturer, 2000, 2010-2013, (Number)
- Figure 21: Large Commercial Aircraft Net Orders, 2013 and Partial-year 2014, (Number)
- Figure 22: Regional Aircraft Deliveries, by Model, 2011-2013, (Number)
- Figure 23: Deliveries of Business Aircraft, by Manufacturer, 2009-2013, (Number of Aircraft)
- Figure 24: Deliveries of Business Aircraft, 2009-2013, (Number)

Defence

- Figure 25: The UK Defence Departmental Expenditure Limits and Defence Spending, 2009/10-2013/14, (£ Million)
- Figure 26: UK Defence Departmental Expenditure Limits and Defence Spending, 2009/10-2013/14, (£ million)
- Figure 27: The UK Defence Departmental Capital Expenditure Limits, 2006/2007-2010/11, (£ Million)
- Figure 28: The UK Defence Departmental Capital Expenditure Limits, 2011/12-2013/14, (£ Million)
- Figure 29: The UK Defence Departmental Cash Resource Expenditure Limits, 2011/12-2013/14, (£ Million)
- Figure 30: UK Defence Departmental Cash Resource Expenditure Limits, 2011/12-2013/14, (£ Million)
- Figure 31: The UK Defence Annually Managed Expenditure Limits, 2009/2010-2013/14, (£ Million)
- Figure 32: MoD Equipment Expenditure, 2009/2010-2013/14, (£ Million)
- Figure 33: MoD Equipment Expenditure, 2009/10-2013/14, (£ Million)
- Figure 34: MoD Research & Development Expenditure Outturn, 2007/2008-2011/12, (£ Million)
- Figure 35: UK Defence Expenditure by Industry, 2008/09-2012/13, (£ Million)
- Figure 36: MoD Major Equipment Projects, as at 31 March 2013, (£ Million)
- Figure 37: Defence Aircraft and Spacecraft Expenditure Outturn in the UK, 2008/09-2012/13, (£ Million)
- Figure 38: Defence Aircraft and Spacecraft Expenditure Outturn in the UK, 2008/09-2012/13, (£ Million)
- Figure 39: Forward Available Fleet by Aircraft Type for the UK Armed Forces, 2009-2013, (Number)

BUY THIS
REPORT NOW

VISIT: store.mintel.com
 CALL: EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094
 Americas +1 (312) 943 5250 | APAC +61 (0) 2 8284 8100
 EMAIL: reports@mintel.com

Aerospace Industry (Industrial Report) - UK - November 2014

Report Price: £995.00 | \$1611.35 | €1263.96

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

PFI

Figure 40: MoD PFI Projects, 2013, (Year and £ Million)

International Trade

Key points

Overview

Imports

Figure 41: UK Imports of Aerospace Equipment, 2009-2013, (£ Million at CIF)

Figure 42: UK Imports of Aerospace Equipment, 2009-2013, (£ Million at CIF)

Segmentation

Figure 43: Segmentation of UK Imports of Aerospace Equipment, by Type, 2009-2013, (£ Million at CIF)

Exports

Figure 44: UK Exports of Aerospace Equipment, 2009-2013, (£ Million at FOB)

Figure 45: UK Exports of Aerospace Equipment, 2009-2013, (£ Million at FOB)

Segmentation

Figure 46: Segmentation of UK Exports of Aerospace Equipment, by Type, 2009-2013, (£ Million at CIF)

Figure 47: Identified Orders of UK Exports of Defence Aircraft and Equipment, 2009-2013, (£ Million)

Figure 48: Identified Orders of UK Exports of Defence Aircraft and Equipment, 2009-2013, (£ Million)

Figure 49: UK Aerospace Equipment Trade Balance, 2009-2013, (£ Million)

Figure 50: UK Aerospace Equipment Trade Balance, 2009-2013, (£ Million)

Industry Structure

Key points

Industry development

Figure 51: Analysis of the Changes in the Structure of the Aircraft and Spacecraft Manufacturing industry, 2010-2014, (Number of Factories and Businesses)

Structure by Employment

Figure 52: Analysis of the Employment Structure of the Aircraft and Spacecraft Industry, 2013 and 2014, (Number of Employees)

Structure by Turnover

Figure 53: Analysis of the Financial Structure of the Aircraft and Spacecraft Manufacturing Industry, 2013 and 2014, (£000 and Number of Companies)

Company Profiles

Airbus Operations

Figure 54: Financial Analysis of Airbus Operations, 2009-2013, (£ Million)

BAE Systems

Figure 55: Financial Analysis of BAE Systems, 2009-2013, (£ Million)

Cobham

Figure 56: Financial Analysis of Cobham, 2009-2013, (£ Million)

GE Aircraft Engine Services

Figure 57: Financial Analysis of GE Aircraft Engine Services, 2009-2013, (£ Million)

Gkn

**BUY THIS
REPORT NOW**

VISIT: store.mintel.com
CALL: EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094
Americas +1 (312) 943 5250 | APAC +61 (0) 2 8284 8100
EMAIL: reports@mintel.com

Aerospace Industry (Industrial Report) - UK - November 2014

Report Price: £995.00 | \$1611.35 | €1263.96

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

Figure 58: Financial Analysis of GKN, 2009-2013, (£ Million)

GKN Aerospace Services

AgustaWestland

Figure 59: Financial Analysis of AgustaWestland, 2009-2013, (£ Million)

Rolls-Royce

Figure 60: Financial Analysis of Rolls-Royce, 2009-2013, (£ Million)

Short Brothers

Figure 61: Financial Analysis of Short Brothers, 2009-2013, (£000)

Turbo-Union

Figure 62: Financial Analysis of Turbo-Union, 2009-2013, (£000)

Figure 63: Profiled Companies' Turnover, 2009-2013, (£ Million)

Forecast

Key points

Industry outlook

Figure 64: Forecast World Mainline Jet Deliveries, by Type, 2014-2033, (Number)

Figure 65: Forecast World Mainline Jet Deliveries, by Type, 2014-2033, (Number)

Figure 66: Forecast World Airplane Fleet, by Region, 2013 and 2033, (Number)

Figure 67: Forecast World Airplane Fleet, by Region, 2013 and 2033, (% of Total)

Figure 68: Forecast UK DEL on Defence, 2013/14-2015/16, (£ Million)

Figure 69: Forecast UK DEL on Defence, 2013/14-2015/16, (£ Million)

Further Sources and Contacts

Trade associations

Trade magazines

Trade exhibitions

BUY THIS
REPORT NOW

VISIT: store.mintel.com

CALL: EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094

Americas +1 (312) 943 5250 | APAC +61 (0) 2 8284 8100

EMAIL: reports@mintel.com