The Global Full-Service Airline Market to 2018

Description:
The report provides detailed market analysis, information and insights, including:

- Historic and forecast revenues of global full-service airlines in 40 countries
- Detailed analysis by region of full-service airlines' key performance indicators, such as seats available and seats sold, load factor, average revenue per passenger, total revenues, revenue-generating passenger kilometers, and passenger kilometers available for the review (2009–2013) and forecast (2014–2018) periods.
- Regions covered are the Americas, Asia-Pacific, Europe, the Middle East and Africa
- Brief analysis of the global full-service airlines market
- Detailed analysis of the trends in key full-service airline markets

Summary:
Despite growth in the market shares of low-cost carriers (LCCs), full-service airlines posted strong growth during the review period. With the exception of Japan, the world's 10 leading full-service airline markets posted strong growth: the US posted a CAGR of 7.23%, while Russia rose by 28.39%. Both China and the UAE expanded by 18.31%, while Singapore recorded a growth of 10.34%. Key markets in Europe recorded moderate growth due to the eurozone crisis, while Japan and more developed economies in Europe such as Spain were the worst affected by LCCs.

Scope:
This report provides an extensive analysis of the global full-service airlines market, including:
- The full-service airline market sizes for 40 countries for 2009–2013, and forecast figures for 2014–2018
- Full-service airlines' key performance indicators in these countries, with values for both the 2009–2013 review period and the 2014–2018 forecast period

Reasons To Buy:
- Take strategic business decisions using historic and forecast market data related to the global full-service airline market
- Understand the key market trends and growth opportunities in the global full-service airline market
- Gain strategic insights into the leading global full-service carriers

Key Highlights:
- A key concern facing full-service airline operators is the unprecedented growth and success of low-cost carriers (LCCs) during the review period. The economic slowdown adversely impacted customer confidence, leading them to look for a cheaper means of travel. The popularity of LCCs has forced many full-service airlines to launch subsidiaries, offering flights with limited services.
- More than US$40 billion in ancillary fees (or fees from non-ticket sources) was collected worldwide in 2013. Full-service airlines recorded US$15.1 billion in ancillary revenue in 2013, an increase of 18.0% over 2012.
- The US aviation market has been in a period of consolidation since 2008, the latest merger was between American Airlines and US Airways in 2013. Consolidation has resulted in market concentration, with the three leading full-service carriers, American, United and Delta, collectively accounting for 75% of traffic. Consolidation has also resulted in a slowdown in capacity growth as the newly merged airlines realigned their capacity to increase profitability.
- In markets such as China and Japan, LCCs have entered lately and have therefore not caused major damage to full-service carriers. Full service carriers accounted for 84.3% of the airlines revenues in Japan in 2013, while it represented a share of 94.7% in China. However, over the forecast period, the share of full-service carriers in Japan and China is expected to decrease to 80.1% and 93.2%, respectively.
- Leading European full-service airlines which were badly hit by the region's poor economic conditions showed signs of improvement in 2013. Air France-KLM, which registered operating losses of US$482.0 million in 2012, recorded operating profits of US$180.2 million in 2013. From a loss of US$31.4 million in 2012, International Airlines Group (IAG) recorded profit of US$1.1 billion in 2013. These encouraging results are primarily due to their cost-cutting efforts and the restructuring of flight operations to focus on important international routes.
Rising demand for air travel will primarily drive the growth of full-service airlines in the Middle East. Central hubs of the region facilitate airlines to serve several routes that have inadequate traffic. Alliances and equity stakes in carriers from neighboring regions will nourish the region’s hubs. Etihad acquired a 49% stake in Alitalia in 2014, Emirates formed an alliance with Qantas in 2012, Etihad signed a codeshare agreement with Air France-KLM Group and Air Berlin in 2012 and Qatar Airways joined the oneworld alliance in 2013.
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