

AMPHIBIOUS AIRCRAFT MARKET (2018 – 2023)



Sample

Product Id: 64422

Domain: Aviation

Base Year: 2017

Forecast Period: 2018-2023

Historic Period: 2012-2016

USE THIS REPORT TO:

- Develop an understanding of the current and future market outlook in the developed and emerging markets
- Get various perspectives of the market with the help of Porter's five forces analysis
- Understand detailed analysis of the segment that is expected to dominate the market
- Get an insight on the latest developments, market shares, and strategies employed by the major market players



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INTRODUCTION

1.1 Scope of the Study

1.2 Market Definition

1.3 Executive Summary

**AMPHIBIOUS
AIRCRAFT MARKET**

By Aircraft Usage

Civilian

Military

By Geography

North America

Europe

Asia-Pacific

South America

Middle East & Africa

RESEARCH METHODOLOGY

2.1 Study Deliverables

2.2 Study Assumptions

2.3 Research Phases

AIM AND OBJECTIVE OF THE STUDY

To gain a fundamental understanding of the global and regional amphibious aircraft market, by analyzing key market dynamics and profiling key vendors to structure the competitive landscape.

FORECAST PERIOD

2018 - 2023

BASE YEAR

2018

COMPANIES PROFILED

10

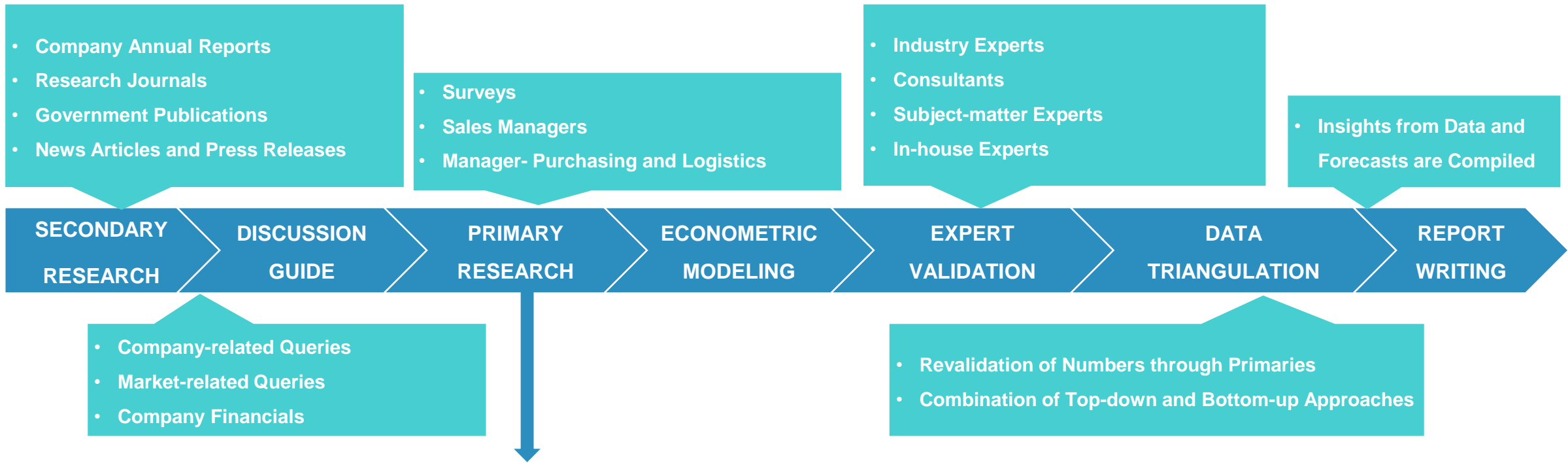
GEOGRAPHICAL SCOPE



SEGMENTS COVERED

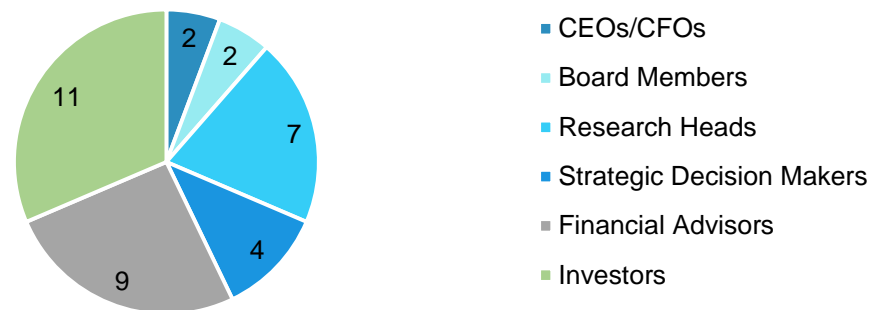
- MARKET DYNAMICS
- PORTER'S FIVE FORCES ANALYSIS
- SEGMENT AND SUB-SEGMENT ANALYSIS
- KEY PLAYERS
- COMPETITIVE LANDSCAPE

- ✓ The base currency considered was the US Dollar (USD). The conversion of other currencies to USD was considered based on the average exchange rate for the respective review period years. The exchange rate conversion for forecast period was determined according to the base year's conversion rates.
- ✓ The base year was identified based on the availability of annual reports and secondary information. The base year considered for this study is 2018.
- ✓ The review period considered for this study is from 2012 to 2017. The CAGR is for the forecast period, 2018-2023.
- ✓ Market size estimations for the forecast years were in real terms. Inflation is not part of the pricing and the average selling price (ASP) was kept constant through the forecast period for each country.
- ✓ Distribution of primary interviews conducted was based on the regional share of the market and the presence of key players in each region.
- ✓ As a result of data-triangulation through multiple methodologies and approaches, the weighted averages of resulting estimates were considered to be the final values.

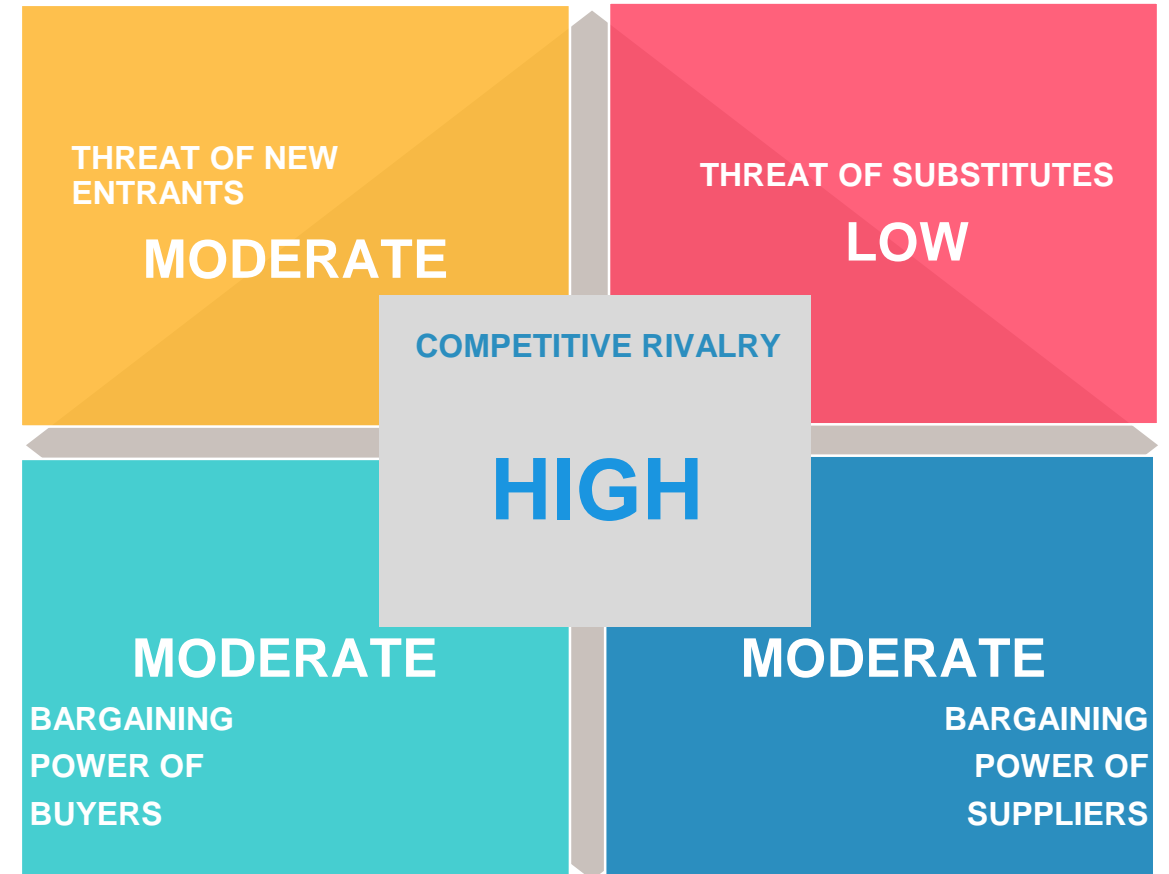


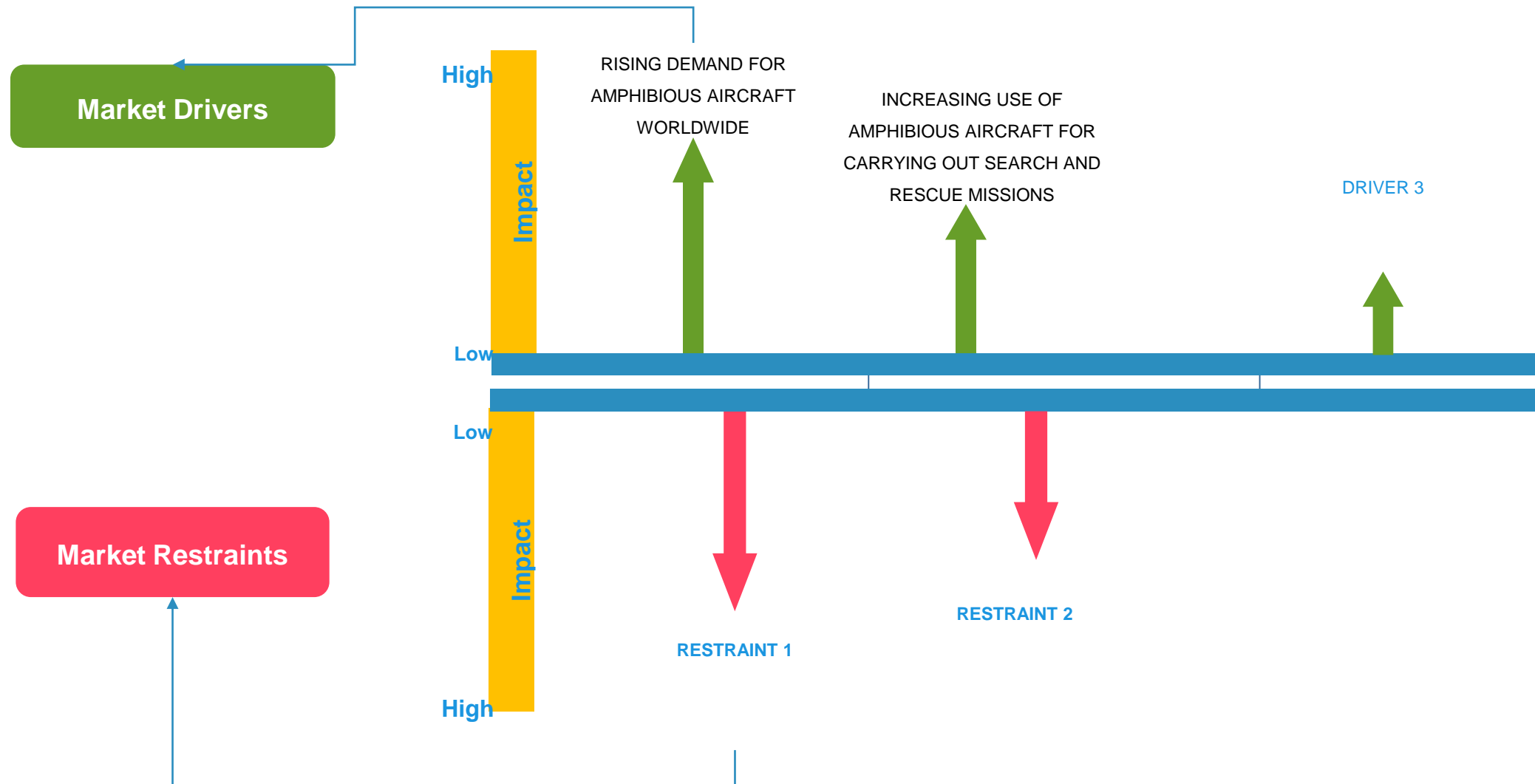
- Company-related Queries
- Market-related Queries
- Company Financials

Primary Interviews (%), by Designation



- The porter's five forces model studies the five identified competitive forces that shape every industry and market, in order to determine the intensity of the competition, and thus, the profitability and attractiveness of the industry. The objective of the growth strategy is to adapt to these competitive forces in a manner that may improve the position of the organization. This study, includes an exhaustive porter's five forces framework, incorporating the factors influencing each force, to analyze the market from a microeconomic perspective.
- In the study, porter's five forces are analyzed considering the factors influencing each force and quantifying the factors, through primaries and quantitative analysis. The quantified factors are further mapped out to derive the impact of each force on competitive dynamics.





RIISING DEMANDS FOR AMPHIBIOUS AIRCRAFT WORLDWIDE

- A recently published Dubai Tourism performance report has highlighted that, Dubai, in the recent years, have witnessed a significant growth in terms of the number of tourists visiting the city. Moreover, according to the report, there has been a 7.5% growth in terms of international passengers visiting Dubai. The report also highlights that a total number of 11.58 million international guests visited Dubai in the first 9 months of 2017.
- The increase in the number of international tourists visiting the city in 2017 has also been attributed to the fact that a rise in the number of amphibious aircraft in the region has helped in the development of tourism in Dubai. Companies such as SeaWings are engaged in providing amphibious aircraft services in Dubai since 2007.
- Furthermore, with the completion of the maiden test flight of the AG600 amphibious aircraft, developed in China, led to the country achieving a milestone in terms of the amphibious aircraft development. In addition to this, the completion of the maiden test flight of the aircraft also led to an increase in the demand for the aircraft by various international countries, and China expects to deliver the AG600 amphibious aircraft to its customers by 2022.
- In 2017, the Indian commercial airline carrier SpiceJet announced its plan of acquiring 100 amphibious aircraft from Quest Aircraft Company LLC, a subsidiary of Setouchi Holdings, in Japan. The main motive behind procuring the 100 amphibious aircraft by the Indian region is to connect the remote areas of the Indian subcontinent, conducting aviation operations in those areas, in order to place the remote locations of the Indian subcontinent on the main Indian aviation map. According to SpiceJet, the amphibious aircraft are being evaluated for operating in areas, such as Uttar Pradesh, Rajasthan, Maharashtra, regions in the Northeast, Andaman, Lakshadweep, and other coastal regions.
- The increasing demand for amphibious aircraft in the present scenario leads to the amphibious aircraft market (henceforth, referred to as the market studied), witnessing a huge growth in the coming years.

DETAILED ANALYSIS IN THE FULL REPORT

RISING DEMANDS FOR AMPHIBIOUS AIRCRAFT WORLDWIDE

- In the present scenario, a recently published Dubai Tourism performance report has highlighted that, Dubai, in the recent years, have witnessed a significant growth in terms of the number of tourists visiting the city. Moreover, according to the report, there has been a 7.5% growth in terms of international passengers visiting Dubai. The report also highlights that a total number of 11.58 million international guests visited Dubai in the first 9 months of 2017.
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DETAILED ANALYSIS IN THE FULL REPORT

INCREASING USE OF AMPHIBIOUS AIRCRAFT FOR CARRYING OUT SEARCH AND RESCUE MISSIONS WORLDWIDE

- There has been a rise in the usage of amphibious aircraft aiding in search and rescue missions, worldwide.
- Marine accidents, worldwide, together with the changing technology have helped in shaping a way of conducting missions related to maritime search and rescue.
- Finding shipwrecks, as well as, maritime disasters have helped in raising awareness of the dangers inherent in the maritime environment. Newer technology, such as motorized life saving boats, helicopters, as well as amphibious aircraft, in the present scenario, have led to providing services with the technology, necessary for a robust response capability. Major response efforts and the evolving technology related to maritime search and rescue have continued to influence the US Coast Guard.
- Moreover, in the present scenario, the region of China has been developing its newest AG600 amphibious aircraft, which can be used for fighting forest fires as well as aid in search and rescue operations. The AG600 developed by the Chinese region can fly for 12 hours and has a range of 4,500 kilo meters. The aircraft has been originally designed for search and rescue operations and can seat 50 people.

DETAILED ANALYSIS IN THE FULL REPORT

MARKET SEGMENTATION AND ANALYSIS – BY AIRCRAFT USAGE

5.1 Civilian

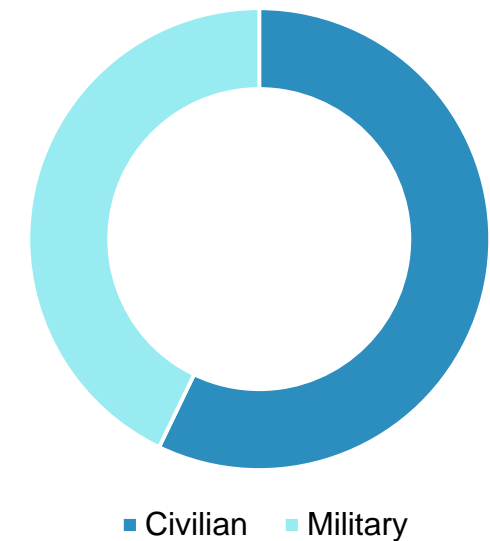
5.2 Military

Amphibious Aircraft Market: Revenue in USD billion,
by Aircraft Usage, Global, 2016 - 2023

Aircraft Usage	2016	2017	2018	2019	2020	2021	2022	2023	CAGR (%)
Civilian	XX	XX	XX	XX	XX	XX	XX	XX	XX
Military	XX	XX	XX	XX	XX	XX	XX	XX	XX

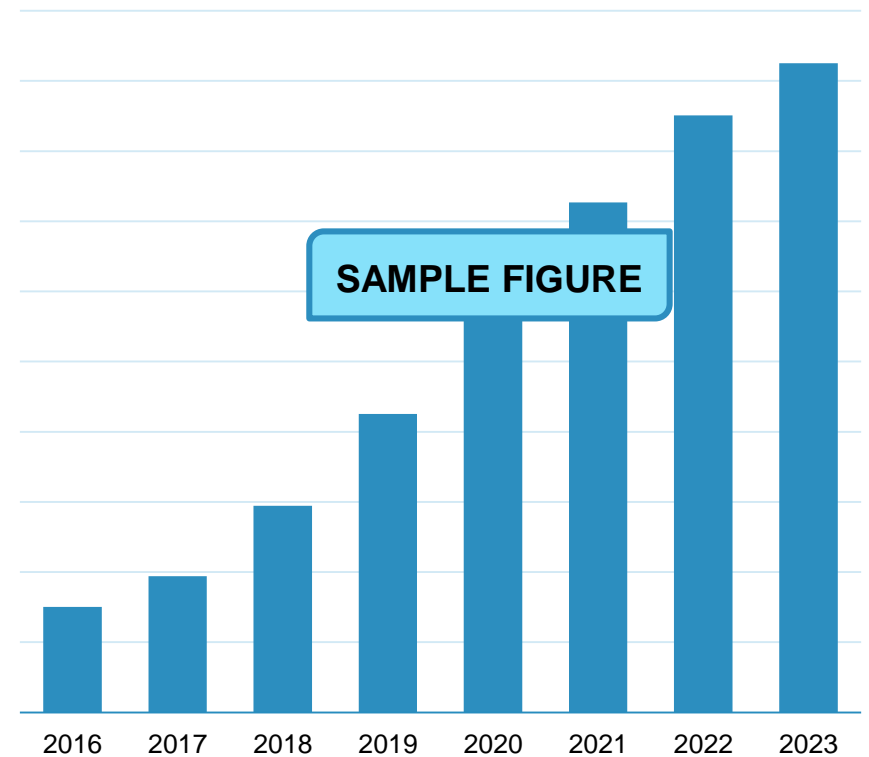
Source: Mordor Intelligence Analysis

Amphibious Aircraft Market:
Revenue Share (%), by Type, 2017



- The market studied for civilian usage is expected to reach USD XX billions by 2023, at CAGR of XX% during the forecast period.
- There has been a growth in the recent years in fleet size of amphibious aircraft worldwide, owing to the fact that various regions are coming up with newer and advanced technology for their amphibious aircraft and a general view of their use be extremely beneficial.
- Since the past few years, China has progressed in terms of its development in aircraft carrier, fighter jets, as well as its own mid-sized civilian aircraft. Moreover, the country which raised its spending on the defense budget by 7% in 2017 has announced that they have tested the biggest seaplane in the world.
- China has also confirmed that its new seaplane AG600, which can fly out to the seas for environmental inspections as well as resource surveying, can also transport people and supplies, and is one of the most advanced technology amphibious aircraft ever built, which can rival the amphibious aircraft produced in Japan and Russia.
- Mahindra Defence, which is a part of the Mahindra Group, in 2018 announced that it has been selected by the Japanese aircraft maker, ShinMaywa Industries Limited, to be the regional partner for conducting manufacturing and related operation for the US-2 seaplane, being manufactured by ShinMaywa Industries Limited for India.

**Amphibious Aircraft Market : Revenue in USD
billion, Civilian, Global, 2016 - 2023**



Source: Mordor Intelligence Analysis

GLOBAL MARKET ANALYSIS

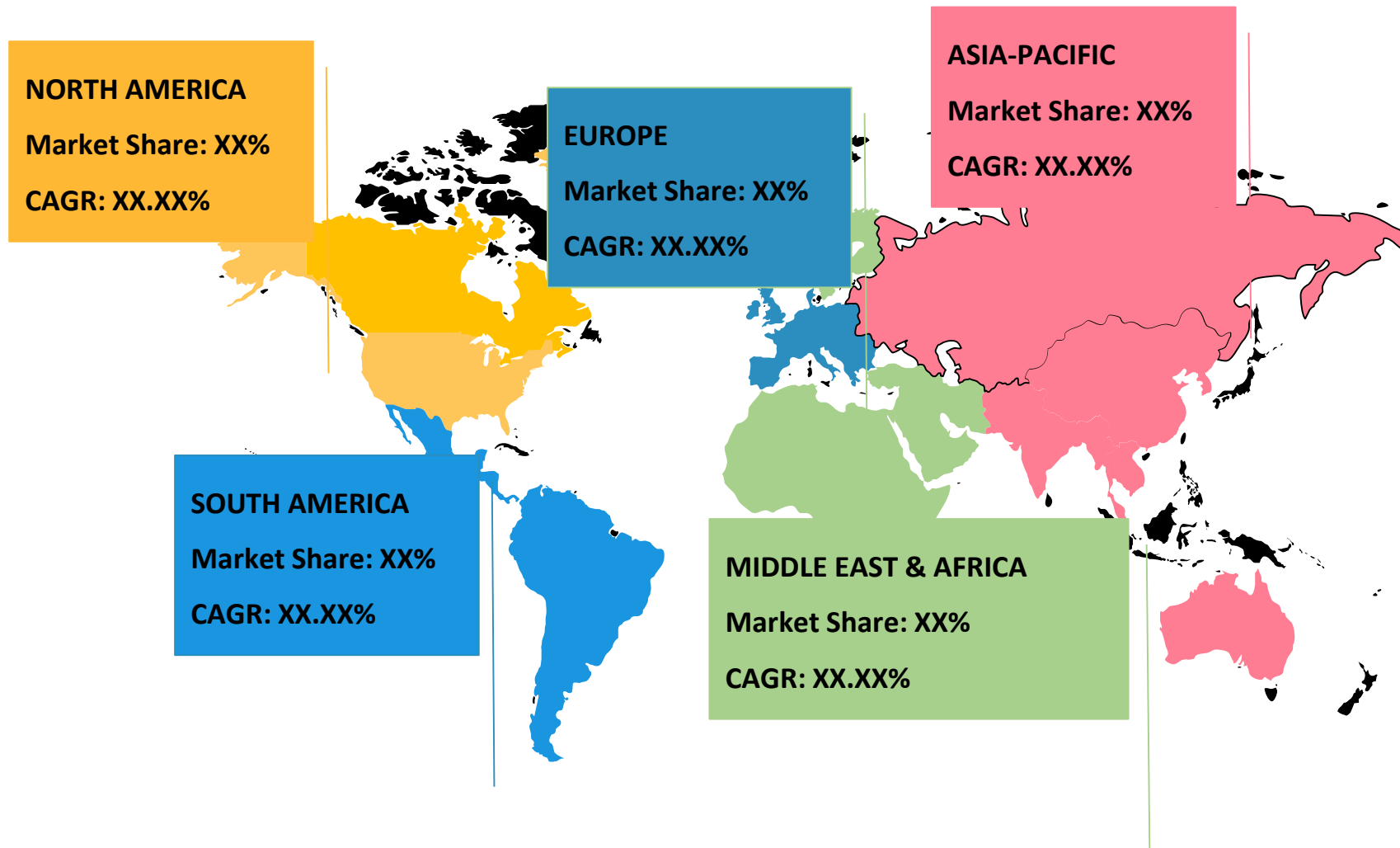
6.1 North America

6.2 Europe

6.3 Asia-Pacific

6.4 South America

6.5 Middle East & Africa

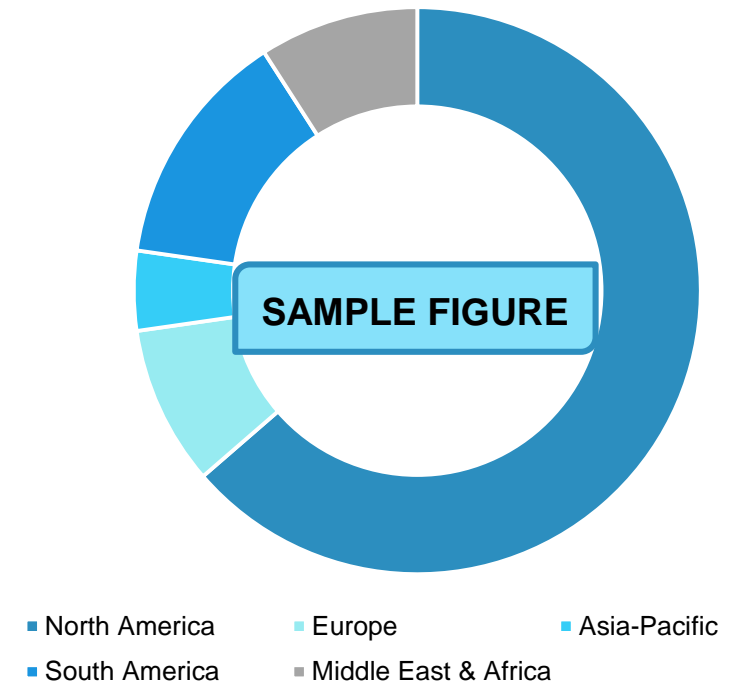


Amphibious Aircraft Market : Revenue in USD billion,
by Geography, Global, 2016 - 2023

Region	2016	2017	2018	2019	2020	2021	2022	2023	CAGR (%)
North America	XX	XX	XX	XX	XX	XX	XX	XX	XX
Europe	XX	XX	XX	XX	XX	XX	XX	XX	XX
Asia-Pacific	XX	XX	XX	XX	XX	XX	XX	XX	XX
South America	XX	XX	XX	XX	XX	XX	XX	XX	XX
Middle East & Africa	XX	XX	XX	XX	XX	XX	XX	XX	XX

Source: Mordor Intelligence Analysis

Amphibious Aircraft Market: Revenue Share
(%), by Geography, Global, 2017



ASIA-PACIFIC

6.3.1 India

6.3.2 China

6.3.3 Japan

6.3.4 Rest of Asia-Pacific

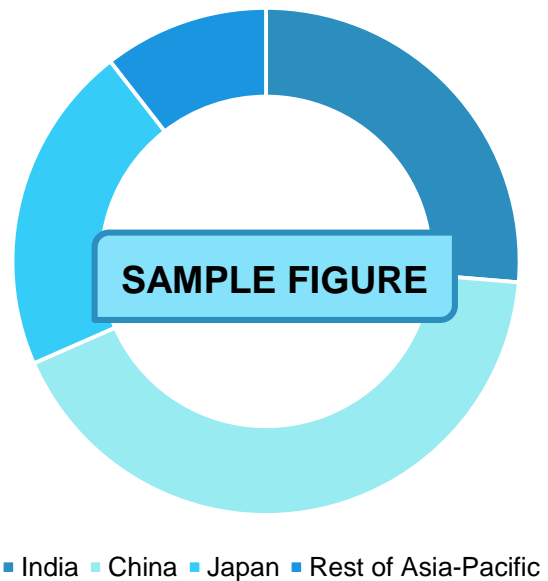
Amphibious Aircraft Market : Revenue in USD billion, by Country, Asia-Pacific, 2016 - 2023

COUNTRY	2016	2017	2018	2020	2021	2022	2023	CAGR (%)
India	XX	XX	XX	XX	XX	XX	XX	XX
China	XX	XX	XX	XX	XX	XX	XX	XX
Japan	XX	XX	XX	XX	XX	XX	XX	XX
Rest of Asia-Pacific	XX	XX	XX	XX	XX	XX	XX	XX

Source: Mordor Intelligence Analysis

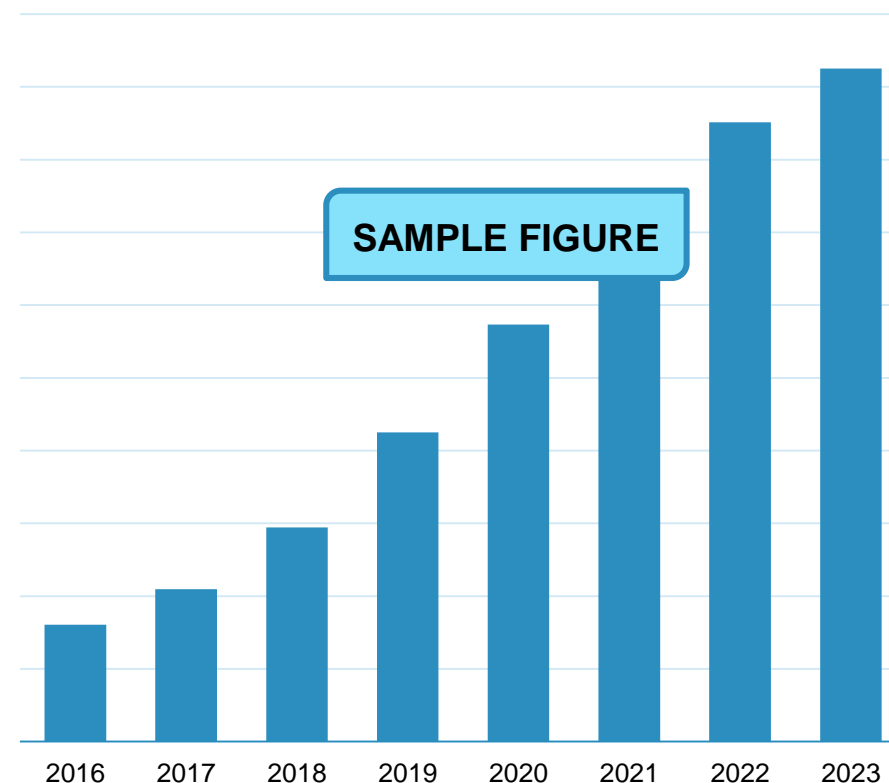
In 2018, seven of the aircraft carriers of the US Navy have been deployed all at once for the first time in seven years. All of these seven aircraft carriers deployed in the Western Pacific regions and the Atlantic region were conducting training missions before their deployment in the US Navy.

Amphibious Aircraft Market :
Revenue Share (%), by
Country, Asia-Pacific, 2017



- The market studied in China is poised to grow at an estimated CAGR of XX% and is expected to reach USD XX Billion by 2023 at a CAGR of XX%.
- The amphibious aircraft market in China has been witnessing a significant growth, owing to the introduction of newer technology in terms of amphibious aircraft, which has proved to be a success while possessing the capability of excelling various other amphibious aircraft produced by Japan and Russia.
- China has progressed rapidly with its development of their newest AG600 amphibious aircraft. The AG600 has been developed by China as a part of a drive, in order to modernize the military capabilities of the region amidst the territorial disputes taking place in the South China sea, which has led to rising tensions in the regions of Asia-Pacific and the North America.
- China had spent eight years for developing its AG600 amphibious aircraft. The aircraft, is the same size as a Boeing737, has been designed to carry out marine rescues and battle forest fires. The aircraft is powered by four turbo prop engines and has a range of 4,500 kilo meters and is designed to take off and land in waves, ranging two meters, and has the capacity to carry about 50 people during its maritime search and rescue, and also posses the ability of holding 12 metric tons of water, which can be used during firefighting missions.
- In addition to this, China expects to deliver its largest amphibious aircraft, the AG600 to its customers, worldwide, by 2022. Aviation Industry Corporation of China, the manufacturer of the airplane, has reported that it has received 17 delivery orders from the Chinese government for the aircraft.

**Amphibious Aircraft Market : Revenue in
USD billion, China, 2016- 2023**



Source: Mordor Intelligence Analysis

COMPANY PROFILES

10.1 Vickers Aircraft Company Limited

10.2 Dornier Seawings GmbH

10.3 MVP Aero

10.4 Beriev Aircraft Company

10.5 Irkut Corporation

10.6 Equator Aircraft Norway

10.7 Aero Adventure

10.8 AtoI Aviation OY

10.9 Faulhaber

10.10 ShinMaywa Industries Limited

- ShinMaywa Industries Ltd. is engaged in manufacturing and selling of amphibian aircraft and commercial aircraft components. The company is also engaged into manufacturing of aircraft passenger boarding bridges.
- The company was formerly known as Shin Meiwa Industry Company Limited.
- The company is engaged in manufacturing of the US-2 and the predecessor US- 1A amphibious aircraft, which are currently in operation by Japan's Ministry of Defence, as STOL search and rescue amphibian aircraft. Moreover, according to the company, its US-2 amphibian aircraft have been deployed for more than 1000 times, in order to rescue the victims in maritime accidents.
- The company operates under the five business sectors namely, Industrial Machinery Systems, Fluid Equipment, Parking Systems, Aircraft as well as Special Purpose Trucks.



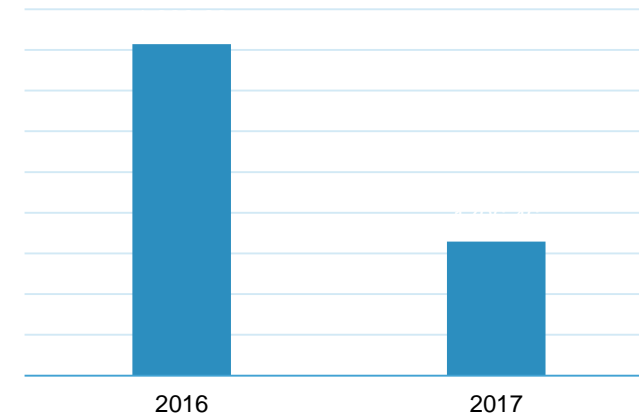
USD

1796.46 million

Revenue (2017)

4,808

Employees

**ShinMaywa**
Brighten Your Future**Founded in November 5, 1949****Japan****www. Shinmaywa.co.jp****Half-yearly Revenue in USD**
thousand, 2016-2017

Products

- US-2 and US-1A amphibious aircraft

Competitors

- Vickers Aircraft Company Limited
- Dornier Seawings GmbH
- MVP Aero
- Beriev Aircraft Company
- Irkut Corporation
- Equator Aircraft Norway

Strategies

- Drive value and growth from the aviation platform and services.
- Continuously improve efficiency and competitiveness.
- Maintain and grow the amphibious aviation business of the company.
- Continue to grow its business in the adjacent markets.
- Develop and expand its international business.
- Inspire and develop a diverse workforce to drive success.
- Enhance overall financial performance and competitive positions.



STRENGTHS

- Increasing R&D activities
- Broad range of products and services in all the business segments.
- Continuous expansion in business through successful acquisitions.



WEAKNESS

- Having only two products in terms of amphibious aircraft, limits further development into the market.



OPPORTUNITIES

- International demand for amphibious aircraft.



THREATS

- Changing customer demand for amphibious aircraft.
- Highly regulated environment.

ShinMaywa Industries, as well as, Mahindra Defence have announced a partnership at the Defence Expo 2018, which took place in Chennai. The partnership allows both the companies to join forces, in order to set up services/manufacturing as well as assembling of the structural parts and components for the US-2 amphibious aircraft.

Apr 2018

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Partnership

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AEROSPACE

BMO  **Capital Markets**

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DIEHL
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Rockwell
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