

The Market for General Aviation/Utility Aircraft 2018-2027



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Analysis 4

The Market for General Aviation/Utility Aircraft 2018-2027

Table of Contents

Executive Summary	3
Introduction	3
Trends	4
Competitive Environment	13
Market Statistics	26
Table 1 - General Aviation/Utility Turboprops Unit Production by Headquarters/Company/Program 2018 - 2027	27
Table 2 - General Aviation/Utility Turboprops Value Statistics by Headquarters/Company/Program 2018 - 2027	30
Figure 1 - General Aviation/Utility Turboprops, Unit Production 2018-2027 (Bar Graph).....	33
Figure 2 - General Aviation/Utility Turboprops, Value of Production 2018-2027 (Bar Graph).....	33
Table 3 - General Aviation/Utility Piston Aircraft Unit Production by Headquarters/Company/Program 2018 - 2027.....	34
Table 4 - General Aviation/Utility Piston Aircraft Value Statistics by Headquarters/Company/Program 2018 - 2027	37
Figure 3 - General Aviation/Utility Piston Aircraft, Unit Production 2018-2027 (Bar Graph).....	41
Figure 4 - General Aviation/Utility Piston Aircraft, Value of Production 2018-2027 (Bar Graph)	41
Table 5 - The Market for General Aviation/Utility Aircraft Unit Production by Headquarters/Company/Program 2018 - 2027.....	42
Table 6 - The Market for General Aviation/Utility Aircraft Value Statistics by Headquarters/Company/Program 2018 - 2027	47
Figure 5 - The Market for General Aviation/Utility Aircraft Unit Production 2018-2027 (Bar Graph).....	52
Figure 6 - The Market for General Aviation/Utility Aircraft Value of Production 2018-2027 (Bar Graph)	52
Table 7 - General Aviation/Utility Turboprops Unit Production % Market Share by Headquarters/Company 2018 - 2027.....	53
Table 8 - General Aviation/Utility Turboprops Value Statistics % Market Share by Headquarters/Company 2018 - 2027	54

Analysis 4

Figure 7 - General Aviation/Utility Turboprops
 Unit Production % Market Share 2018-2027 (Pie Chart).....55

Figure 8 - General Aviation/Utility Turboprops
 Value Statistics % Market Share 2018-2027 (Pie Chart).....55

Table 9 - General Aviation/Utility Piston Aircraft
 Unit Production % Market Share by Headquarters/Company 2018 - 2027.....56

Table 10 - General Aviation/Utility Piston Aircraft
 Value Statistics % Market Share by Headquarters/Company 2018 - 2027.....57

Figure 9 - General Aviation/Utility Piston Aircraft
 Unit Production % Market Share 2018-2027 (Pie Chart).....58

Figure 10 - General Aviation/Utility Piston Aircraft
 Value Statistics % Market Share 2018-2027 (Pie Chart).....58

Table 11 - The Market for General Aviation/Utility Aircraft
 Unit Production % Market Share by Headquarters/Company 2018 - 202759

Table 12 - The Market for General Aviation/Utility Aircraft
 Value Statistics % Market Share by Headquarters/Company 2018 - 2027.....61

Figure 11 - The Market for General Aviation/Utility Aircraft
 Unit Production % Market Share 2018-2027 (Pie Chart).....63

Figure 12 - The Market for General Aviation/Utility Aircraft
 Value Statistics % Market Share 2018-2027 (Pie Chart).....63

Conclusion64

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The Market for General Aviation/Utility Aircraft

Executive Summary

Forecast International projects that makers of general aviation and utility aircraft will ship 15,828 aircraft worth \$26.4 billion from 2017 through 2026. The forecast covers piston-powered and turboprop general aviation/utility aircraft and excludes production of business jets and Light Sport Aircraft (LSA).

Production in this segment has been relatively stable since the last recession, ranging between 1,400 and 1,600 aircraft per year. This is far below the level of production seen prior to the last recession, when production peaked at over 3,200 aircraft in 2007. This level of production now seems like an anomaly that will not be repeated during our 10-year forecast period.

Manufacturers delivered 1,480 aircraft in 2016, and production in 2017 is forecast to increase to almost 1,600 aircraft. A significant portion of this jump will result from increased production of the Cirrus SF50 Vision Jet, an aircraft that we believe fits better into the general aviation market segment than the business jet segment.

Production in the general aviation market will increase gradually through 2020, when manufacturers are forecast to deliver just under 1,700 aircraft. The forecast assumes that the market will begin a cyclical downturn in 2021, with production falling to just under 1,300 aircraft in 2022. It will begin to grow again in 2023.

Broken down by engine type, production of piston aircraft is forecast to total 9,687 aircraft worth

\$5.8 billion during the forecast period. Production of turboprops will total 5,607 aircraft worth approximately \$19.5 billion, and production of the single jet aircraft in the study, the Cirrus SF50 Vision Jet, will total 534 aircraft worth \$1.1 billion.

The turboprop market held up relatively well in the wake of the last recession, and the growing popularity of single-engine models has prompted Textron Aviation to expand its product line by launching the all-new Denali. The new model will compete to an extent against the manufacturer's twin-engine Beechcraft King Air family, but it will also provide Textron with a direct competitor to the very popular Pilatus PC-12.

Meanwhile, the piston segment remains in the doldrums. This segment suffered greatly in the last recession and has yet to recover. In the five-year period 2004-2008, production averaged 2,455 aircraft per year. In the five years that followed, average production fell to under 950 aircraft per year. It was not until 2014 that annual production once again topped 1,000 aircraft. The piston market is making progress, but headwinds remain.

The center of gravity in the piston market is the huge number of private pilots in the United States, but this number is on a long-term downslope. Overseas markets for general aviation aircraft in Asia, Eurasia, and Latin America will not grow quickly enough during the next decade to compensate for lost demand in North America.

* * *

PROGRAMS

The following reports are included in this section: (**Note:** a single report may cover several programs.)

ASI/Continental F406
Beechcraft King Air Series
Cessna 208 Caravan
Cessna Denali
Daher TBM 910/930
General Aviation Design, Development & Inactive Programs
Piaggio P180 Avanti EVO
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Piper M500/M600
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TOSHIYUKI HARADA

903 Casa Gyoen, 2-4-2 Shinjuku,
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