

INDONESIA



Market Overview

- Annual forecasted growth rate (2008-2010) – 15%
- Value of imports - \$588 mil
- Est. % of imports over market size – 90%
- % US market share of total imports – 40%

Best Prospects

- Aircraft engines, parts and avionics (commercial and military)
- X-ray machines and metal detectors
- Leasing and maintenance services

MALAYSIA



Market Overview

- Annual forecasted growth rate (2008- 2010) - 8%
- Value of imports - \$1.4 billion
- Est. % of imports over market size - 85%
- Percent of US market share of total imports - 40%

Best Prospects

- Cargo, baggage, carry-on X-ray machines
- Automated baggage handling system
- Aircraft parts and avionics

PHILIPPINES



Market Overview

- Annual forecasted growth rate (2008-2010) - 15%
- Value of imports - \$620.7 mil
- Est. % of imports over market size - 100%
- % U.S. market share of total imports - 20%

Best Prospects

- Aircraft Precision Parts
- Engine Parts & Landing Gear
- Night Capable Attack Helicopters
- Airport and Ground Support Equipment

SINGAPORE



Market Overview

- Annual forecasted growth rate (2008-2010) - 10%
- Value of imports - \$8.7 billion
- Est. % of imports over market size - 87%
- % US market share of total imports - 76%

Best Prospects

- MRO Services
- Landing gears
- Aircraft parts & avionics

THAILAND



Market Overview

- Annual forecasted growth rate (2006-2008) - 3%
- Value of imports - \$1 billion
- Est. % of imports over market size - 100%
- Percent of US market share of total imports – 8.5%-10%

Best Prospects

- Aircraft and related parts
- Avionics, Airframe and engine components
- Maintenance/overhaul
- Aircraft security and training services

VIETNAM



Market Overview

- Forecasted growth rate (2008-2010) – 17% per annum
- Value of imports - \$600 mil.
- Est. % of imports over market size – 95%
- % US market share of total imports – 45%

Best Prospects

- Aircraft & related parts
- Avionic & ATM equipment
- Engine and engine components
- Airport and ground support equipment

Market Specifics

The ASEAN market represents over 10% of the total market for U.S. aerospace exports, with Singapore, Thailand and Vietnam leading the way, ranked among the top 20 destinations for U.S. products in 2004. The ASEAN aerospace market offers opportunities through both civil and military procurement programs, with local governments often stressing partnerships with the domestic aerospace industry. U.S. firms should also be aware of airport renovation projects supported by the Asian Development Bank.

Indonesia



Malaysia



Philippines



Regulating Authority

[Directorate General of Air Communication](#)

[Department of Civil Aviation Malaysia](#)

Department of Transportation and Communications, DOTC
[Air Transportation Office](#)

Future Projects

Medan New Airport, extension of Cengkareng Airport, expansion of commercial airlines.

MAS to expand its fleet; early warning and control platform (AEW&C); purchase of utility helicopters with search & rescue capability.

Airport development and military capability upgrade projects.

Major End-Users Aircraft & Parts

[Lion Air](#)
[Garuda Indonesia](#)
Mandala, Sriwijaya, Adam Air
[Ministry of Defense](#)

[Malaysia Airlines](#)
[Ministry of Defense](#)
[AIROD \(MRO\)](#)

[Philippine Airlines](#)
[Cebu Pacific](#)
[Air Philippines](#)
[Philippine Air Force](#)
[Lufthansa Technik Phils.](#)

Major End-Users Airport Equip.

[PT Angkasa Pura I](#)
[PT Angkasa Pura II](#)

[Malaysia Airports Holdings Bhd](#)

Manila International Airport Authority (MIAA)
[Mactan Cebu Int'l Airport](#)
[Diosdado Macapagal International Airport](#)
[Air Transportation Office](#)

Market Research

Aircraft and Aircraft Parts (02/07)

[Aircraft and Aircraft Parts](#) (9/05)
Malaysia's Aerospace Market (5/07)

[Aviation Industry Overview: Commercial Sales](#) (6/07)
Aviation Industry Overview: Military Sales (12/07)

Trade Events

IndoDefense 2008 and Indo Aerospace 2008
November 19-22 2008, Jakarta

[Defense Services Asia 2008](#)
Apr 2008, Kuala Lumpur
Langkawi International Maritime & Aerospace Exhibition
Dec 2007, Langkawi

[Aviation, Maritime and Defense 2008](#)
September 2008, Manila

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Market Specifics

Singapore 

Thailand 

Vietnam 

Regulating Authority	Civil Aviation Authority of Singapore	Airports of Thailand Department of Civil Aviation Ministry of Transport	No information is currently available for the Vietnam market.
Future Projects	Terminal III and The Budget Terminal have been completed. The CAAS is now in the process to upgrade Terminal I. Procurement of Advanced Jet Trainer by the Republic of Singapore Air Force	Fighter jets Transport Aircraft Upgrade Transport/Attack Helicopters Passenger Aircraft	<ul style="list-style-type: none"> • Procurement of B787s, A350s, A321s, ATR72s • Long Thanh and Phu Quoc Airport projects • Upgrade and build new ATM facilities
Major End-Users Aircraft & Parts	Singapore Airlines Singapore Technologies Aerospace Ltd Republic of Singapore Air Force	Thai Military: Air Force, Army Thai Airways International Plc. Other low-cost carriers	Vietnam Airlines Pacific Airlines
Major End-Users Airport Equip.	Civil Aviation Authority of Singapore Singapore Airlines	Airports of Thailand	Northern Airports Authority Middle Airports Authority Southern Airports Authority
Market Research	Singapore: Aerospace MRO Equipment		Aviation Market Brief (11/07)
Trade Events	MRO Asia October 14-16, 2008, Singapore Singapore Airshow 2010 Feb 2010, Singapore	Defense Asia 2009 Nov 2009, Bangkok	Vietnam Aviation Conference and Expo 2009 (tentative) In Hanoi in December 2009
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