

Annual Strategy Dossier - 2013-2014 - World's 4 Leading Regional Aircraft Manufacturers - Key Strategies, Plans, SWOT, Trends & Strategic Outlook - Bombardier, Embraer, ATR, Sukhoi

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Abstracts

The global market for regional aircraft, traditionally divided across jets & turboprops and dominated as well as marked by the duopoly of Bombardier & Embraer, has seen significant spurt in activity of-late with the growth in demand for larger jets offering more capacity & lower operating costs which has been & is being capitalized upon effectively by Embraer that held a 76% share of the global regional jets deliveries in 2012 with the strategic positioning of its E-Jets portfolio amid a very competitive market landscape which has also led to a significant growth in Embraer's market share to 54% through 2001-2012. Bombardier, on the other hand, has indicated towards its intentions clearly with the advent of C-Series Jets towards a shift in focus beyond the upper end of the price & performance spectrum of regional jet segment towards the lower end of the mainstream commercial jets segment with its ageing CRJ as the only mainstream contender against the E-Jets that have significantly eroded Bombardier's market share over the years and without a new, built from scratch aircraft introduction from the Bombardier stable over near term, Embraer is projected to grow its market share further to 63% through 2013-2015 as against 54% at the end of 2012. Additionally, Embraer's order intake through the first 7 months of 2013 has surpassed Bombardier by a factor of 2.5 standing at \$4.9 billion which is likely to bolster production rate of E-Jets over near term.

The global industry landscape for regional jets is poised for a major transformation with the advent of new players, especially, Sukhoi & Mitsubishi, possessing strong industrial capabilities, in addition, to other advantages emanating from their clean-sheet aircraft designs, competitive pricing & significant know-how of as well as presence across

emerging markets while simultaneously facing delays on account of development issues. Further, Embraer's move to introduce new E2 Jets to take on Bombardier's C-series & the latest industry incumbents by revamping its existing E-Jets portfolio is likely to amplify the overall competitive intensity in the industry significantly. Other key demand drivers for the industry, include, the anticipated replacement demand wave likely to originate from the U.S. market over near term, technological innovations, especially, with the geared turbofan engines from P&W delivering enhanced fuel efficiency & a commensurate reduction in operating costs as well as total cost of ownership, uncertainty over oil prices and steady demand originating from emerging markets, especially, China, Russia, India & the Middle East through 2030 with a rapidly growing middle-class segment. Key challenges for the industry, on the other hand, include a need to enhance overall fuel efficiency through technological developments to counter rising oil price trend and to reduce overall CO2 emissions. Multi-engine turboprops has been the fastest growing segment in the general aviation industry so far in the first half of 2013 having already seen a 70% growth in deliveries during H1 2013 that drove the 25% increase in cumulative aircraft shipment billings. Overall, projections by Bombardier indicate towards a cumulative demand for 12,800 new regional jets through 2032 worth \$646 billion spearheaded by the 100-149 seats segment that is projected to require 6,900 new aircraft deliveries worth \$460 billion, as per latest projections by Bombardier.

All industry OEMs are thus deploying an array of strategies & working towards aligning their existing strategies in-line with the key & emergent industry trends with new aircraft development & technological innovations besides move towards emerging markets being key focus areas.

Against this backdrop, the report analyzes, looks into & provides strategic insights into the key strategies & plans crafted & being pursued by the 4 leading regional aircraft manufacturers, namely, Bombardier, Embraer, ATR & Sukhoi to navigate through the shifting dynamics of the global regional aircraft industry and provides strategic insights into the key industry trends, challenges & risk factors that are likely to shape the future of the industry followed by an insightful industry SWOT & Force Field Analysis and strategic outlook for the industry for 2014.

Key Strategies & Plans included in the Report for each OEM:

1. Product Portfolio Strategies & Plans
2. Market Specific Strategies & Plans - Traditional & Emerging Markets
3. R&D Strategies & Plans

4. Growth Strategies & Plans
5. Business and Corporate Strategies & Plans
6. Sales & Marketing Strategies & Plans
7. Production/Manufacturing Strategies & Plans

Excerpts/Highlights from the report:

1. Analysis of Embraer's overall product development strategy for enhancing its market leadership further.
2. Analysis of the anticipated change in industry landscape & competitive intensity with the advent of a string of new aircraft programs from latest industry entrants, especially, COMAC's ARJ & Mitsubishi's MRJ poised to enter service and the potential impact on the industry's further evolution.
3. Analysis of Bombardier's foray into the lower end of the mainstream aircraft market segment with its flagship C-Series and the potential impact on further evolution of the regional jets segment.
4. ATR's plans to capitalize on the rising global oil price trend with its more fuel efficient turboprops as compared with jets with Turboprop aircrafts projected to account for about 48% of the 60-99 seats segment through 2032. Also, analysis of rapid growth in Turboprop deliveries during H1 2013.
5. New aircraft development by most key OEMs offering enhanced fuel efficiency, superior cabin comfort, optimized performance characteristics & significantly reduced environmental footprint; is a key demand driver for new aircrafts with airlines looking at replacing their ageing aircraft fleets.
6. Analysis of the growing preference for larger aircrafts by regional airlines delivering enhanced fuel efficiency & better operating economics subsequently with 100-149 seats segment likely to spearhead demand growth through 2032 with airlines focusing towards fleet optimization & enhanced operating efficiency.
7. Emerging markets likely to play a strategic role in new aircraft demand with their rapidly rising middle-class populations and above average GDP growth rates driving travel demand.
8. Analysis of Global Oil price trend and the commensurate, potential implications for new aircraft demand

Usage & Relevance:

The report provides & will be useful for:

Strategic Planning, Competitive Analysis & Benchmarking Exercise

Comprehensive Strategic & Competitive Assessment & Analysis for each key OEM

Strategic Insights into the key Business Strategies & Plans being pursued by each key OEM

Gaining a Strategic Perspective on the Business & Strategic Outlook for all key players for 2014

Strategic Analysis and Vital Inputs essential for Strategic Planning & Decision-Making Process

Gaining access to Key Industry as well as Market Trends, Insights & Growth Opportunities

Analysis of Forces Driving as well as restraining the Industry & their overall Dynamics

Identifying & highlighting areas for Potential Strategic Changes, Adjustments & Realignment

Gaining access to Key Industry Trends & Insights; crucial inputs for Decision-Makers

Analysis of Forces Driving and Restraining the Industry & their overall Dynamics

Identifying & highlighting areas for making Potential Strategic Changes, Adjustments and

Realignment of the internal strategy framework in-sync with emergent trends

Strategic Industry Outlook for 2014

For Whom:

The report would be essential for those having strategic interest in the Global Aviation Industry, specifically, the Regional Aircraft segment & will be especially useful for key

decision makers, top management of companies, suppliers, vendors, current & potential investors, industry & company analysts & those associated with the industry.

Highlight:

The report is comprehensive yet concise & compact at the same time; built on the Microsoft PowerPoint platform; thus, rendering it custom-built for meetings & presentations while enabling & ensuring prompt and informed decision making as a ready self-reckoner.

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