

Annual Strategy Dossier - 2014 - World's 5 Leading Aircraft Engine Manufacturers - Key Strategies, Plans, Strategic Insights, SWOT, Trends & Outlook - Pratt & Whitney, Rolls Royce, GE Aviation, Safran, Honeywell

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Abstracts

1. Industry Backdrop & Overview:

Robust Demand for Commercial Aircrafts projected over Medium to Long Term driven by Significant Growth in Air Traffic & Technological Innovations while Budgetary Pressures Impact New Aircraft Acquisitions in the Military Segment:

The demand for commercial aircrafts globally is being driven by growing fleet replacement demand across airlines propelled by significant growth in air traffic and technological innovations, especially, latest aircraft engines delivering an optimized operating economics with a 15%-20% better fuel burn rate in a relatively high fuel price environment, along-with significantly reduced CO₂ emissions and enhanced aerodynamic efficiency emanating from structural design improvements, optimization of wing span & addition of latest winglets. New engine introductions by almost all key manufacturers featuring cutting-edge technologies & innovations have in turn been the most significant demand driver for the latest aircraft programs introduced by OEMs across the commercial & regional segments respectively, namely, the A320 Neo & the A350XWB aircraft family by the Airbus Group and the 737 Max, 787-9, 787-10 & 777X from the Boeing's stable with all featuring expansion of seating capacity, extension of operating range and optimized overall operating economics. In the regional segment, the battle amongst Bombardier's C Series & Embraer's E2 Jets intensifies further with the industry moving away from being a traditional duopoly towards oligopoly with the advent of Mitsubishi's MRJ, Sukhoi's SuperJet, Irkut's MS21 & the COMAC's Chinese regional airliner and significant activity in the 100+ seat segment. The battle for market

share amongst aircraft engine manufacturers too has been equally fierce with Pratt & Whitney's Geared Turbofan Engine (GTF) pitted right against the GE Snecma duo while Rolls Royce's Trent 1000 engine series battles it out with GE's NX engine series over the Boeing's 787 Dreamliner program.

The military aircraft segment, on the other contrary, is facing a tougher trajectory with significant defense spending cuts underway across most traditional markets impacting new aircraft acquisitions. However, the Congressional green light for the continued development of the next generation jet engine program and the approval for the USAF's next generation bomber program, with allocations to the tune of \$1 billion in the DoD's FY2015 budget request for the engine program itself, is likely to give a significant boost to the engine manufacturers and potentially open up strategically significant growth avenues over medium term.

Strong Long-term Industry Fundamentals:

The long-term fundamentals for the commercial, regional, business & military aviation segments remain robust with long-term projections by key industry OEMs & Aircraft manufacturers indicating towards healthy demand growth trend led by the single & twin aisle commercial airliners and the large-cabin, long-range business jets segment respectively. Boeing's long term growth projections indicate towards a 5% average annual growth rate for passenger & cargo traffic over the next 20 years. The growth in the commercial & regional aviation segments is likely to be driven by significant growth in air traffic with economic growth & globalization being key trend drivers spearheaded by the Asia-Pacific region which is projected to account for about 34% of global air traffic through 2032 and will drive growth, especially, for the single aisle passenger aircraft segment with the APAC region projected to receive about 36% of the single aisle passenger aircraft deliveries through 2032.

The business aviation segment is projected to reach the pre-crisis levels, in terms, of demand by 2016 driven by the ongoing economic recovery across North America & Europe and the introduction of new aircraft programs by the OEMs. Further, the potential opening & expansion of Chinese low-altitude airspace by the Chinese civil aviation authorities & the pursuit of civil aviation reforms are likely to give a significant fillip to the civil aviation sector in China with the country projected to catapult itself to become the world's third largest market for business jets over the next decade with estimates by Bombardier indicating towards delivery of about 1,000 business jets likely to be made to China through 2022.

2. Report Overview & Excerpts:

The report analyzes the Strategic Positioning, Priorities & Responsiveness besides providing Strategic Insights into the Key Strategies & Plans being conceptualized, formulated & pursued by the world's 5 Key Aircraft Engine Manufacturers (GE Aviation, Pratt & Whitney, Rolls Royce, Honeywell & Safran) amid rapidly evolving industry dynamics with strong growth trend being witnessed by the commercial & regional aircraft segments, steady ongoing recovery in the business aviation segment and signs for improvements in the military segment amid strong, long-term industry fundamentals. All engine manufacturers are thus focusing strategically on & continue with their R&D pursuits to develop next generation engine technologies with strong focus on material science innovations, new engine architectures & experiments on the inclusion of third air stream.

Report Excerpts:

1. Introduction of New Engine Programs & Technologies by OEMs featuring significant Technological Innovations delivering Enhanced Operating Economics with an Optimized Fuel Burn Rate. The report provides Analysis of Key Engine Programs, New Technology Introductions and the Strategies & Plans being pursued by the industry OEMs.

2. Continued Pursuit of R&D activity for the Development of Next Generation Engine Architectures & Technologies for the Military & Commercial Aircraft Segments by Industry OEMs. The report provides comprehensive analysis of R&D Pursuits of all the five Aircraft Engine Manufacturers, namely, GE Aviation, Pratt & Whitney, Rolls Royce, Honeywell & Safran.

3. Strengthening and Extension of Global Sales, Service & Support Infrastructure with a Strong Focus on the Asia-Pacific region with a significant share of global demand for new aircrafts likely to emanate from the Asia-Pacific region. The Report Analyses & provides Strategic Insights into the Key Strategies & Plans being pursued by the OEMs to further deepen their roots in the strategically significant Asia-Pacific Region.

4. Comprehensive Analysis of Strategies & Plans being Pursued by the OEMs to Offset Significant, ongoing Pressure on Defense Spending across most Traditional Markets.

5. Analysis of Key Global Aerospace Industry Trends(including Commerical, Military, Regional, Business & Helicopter Segments) and Key Technological Trends likely to Shape Industry's Future. (Additional Strategies, Plans & Trends available & analysed in the report)

3. Relevance & Usefulness: Provides Inputs for Incorporation into the Broader Strategic Planning & Decision-Making Process.

The report will be useful for:

Key Inputs for Strategic Planning & Decision-Making Process

Competitive Analysis & Strategic Benchmarking Exercise

Comprehensive Strategic & Competitive Assessment & Analysis for each key OEM

Strategic Insights into 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

Gaining access to Key Industry Trends & Insights; Crucial Inputs for Decision-Makers

Identification & Analysis of Potential Growth Opportunities & Avenues

Gaining access to Key Industry Issues, Challenges & Risk Factors

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

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

Gaining a Strategic Perspective on the Industry's Strategic Outlook for 2014

4. For Whom: Key Decision-Makers across Industry Value Chain

The report would be essential for those having strategic interest in the Global Defense & Aerospace Industry & will be especially useful for Key Decision-Makers, Top Management of Companies, OEMs, Suppliers, Distributors, Vendors and other Key Players in the Industry Value Chain as well as existing & potential Investors, Industry & Company Analysts, PE Firms, Venture Capitalists & those associated with the Industry.

5. Report Highlights: Visual Representation/Orientation with a Slide based Architecture

The report is comprehensive yet concise & compact at the same time; is custom-built for meetings & presentations with visual representation & orientation based on a slide architecture, being built on the Microsoft PowerPoint platform; in addition, to being a ready self-reckoner as well as a quick reference guide driving, enabling & ensuring prompt and informed decision making.

6. Key Takeaways: Enhanced Scope of Utilization & Application with Visual Representation

This PowerPoint architecture based report provides high readability, ease of navigation and saves significant amount of time by saving the end-user the effort of sifting through voluminous pages of text besides enhancing the scope of retention, utilization & application of analysis with visual representation and incorporation of relevant images to support & supplement the analysis.

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Strategic Industry Outlook

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