Annual Strategy Dossier - 2014 - World's 6 Leading Helicopter & Rotorcraft Manufacturers - Key Strategies, Plans, Strategic Insights, SWOT, Trends & Strategic Outlook - Airbus Helicopters, AgustaWestland, Bell, Boeing, Russian Helicopters, Sikorsky

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Abstracts

1. Industry Overview & Backdrop: Continued Budgetary Pressures across Traditional Markets Impacting Military Segment. Steady Growth Projections for Civil Segment over Medium Term.

Military Segment - Global Military Helicopter & Rotorcraft Segment Driven by Expanding Role in Force Structure, Extension of Capabilities Powered by Development of Cutting-Edge Platforms as well as Technologies & Significant Global Replacement Demand :-

The global military helicopter & rotorcraft segment globally is being driven by rapidly expanding role of helicopters in the overall force structure of armed forces globally with the showcasing of their capabilities for conducting a broad range of anti-terrorism directed military operations & countering a wide range of asymmetric threats during the allied war on terror across Iraq & Afghanistan war theatres during the first decade of this century.

Additionally, the evolving role of helicopters as significant force multipliers with their rapidly increasing capabilities, especially, with the rise of rotorcrafts, & their increasing indispensability for conducting a wide range of military operations & missions and the rapidly evolving nature of threat perception from symmetric to asymmetric has made their presence formidable with the battlefield boundaries becoming increasingly

nebulous. The development of experimental compound helicopter platforms, especially, the self-funded X2 program by Sikorsky & X3 by Eurocopter have already heralded the beginning of a new technological era as well as leap for military helicopters, in terms, of operational spectrum & capabilities.

Further, the imminent, significant replacement demand for ageing military helicopters emanating from traditional as well as emerging markets and strong R&D activity driven technological developments & innovations are likely to be a strong demand driver over medium term for military helicopters & rotorcrafts despite the ongoing, significant pressure on defense budgets across most traditional markets.

Civil Segment - Global Civil Helicopter & Rotorcraft Segment being Driven by the Development & Introduction of New Product Platforms by OEMs, Growing Demand from Emerging Markets across Key Market Segments & Significant Replacement Demand likely to emanate from the Offshore Oil & Gas Exploration Sector:-

The global civil helicopter & rotorcraft industry segment is being driven by the development of new helicopter platforms by OEMs offering enhanced performance capabilities while reducing operating economics significantly, foray into entirely new segments, like, Super mid-size besides significant growth in global oil & gas exploration activity driven by growing oil demand from key Asian economies, an ageing global civil helicopter fleet deployed in the oil & gas exploration sector and growing demand from the EMS, Law Enforcement & VIP Transportation segments, especially, across emerging markets. About 4,800 to 5,500 new civil helicopters are projected to be delivered globally through the 2014-2018 period based on forecasts by Honeywell in its Turbine-Powered Civil Helicopter Purchase Outlook for 2014. The helicopter deliveries are likely to be split equally amongst traditional & emerging markets with North America projected to take the lead amongst traditional markets while Latin America is projected to clearly outclass other emerging markets in terms of deliveries. Offshore oil & gas exploration sector besides law enforcement are likely to be the biggest drivers of fleet utilization globally.

2. Report Overview & Rationale: Insights into Key Strategies & Plans for OEMs & Assessment of Strategic Positioning & Responsiveness.

Key global industry OEMs are deploying an array of strategies aimed at stimulating latent market demand in the civil segment with new product platform introductions, pursuing international exports opportunities aggressively, strengthening presence across key global markets, reinforcing MRO network & capabilities significantly and enhancing cost effectiveness at their end while simultaneously optimizing value for their global operator base. The report provides Strategic Insights into the Key Strategies & Plans being conceptualized & pursued by the industry OEMs to partially offset ongoing spate of defense spending cuts across most traditional markets while leveraging the significant opportunities being provided by the civil segment with steady growth projected over near to medium term.

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

The report will be useful for:

Key Inputs for Strategic Planning & Decision-Making Process

Competitive Analysis & Benchmarking Exercise

Comprehensive Strategic & Competitive Assessment and Analysis of Strategy Orientation 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. Report Excerpts:

1. Analysis of Airbus Helicopter's Innovation Driven New Product Development Strategy and Plans to Strengthen Technological Capabilities in the UAS Domain significantly.

2. Analysis of AgustaWestland's Global Platform Modular Product Strategy, Technological Innovation driven Product Differentiation Strategy & Continued Diversification of Global Industrial Footprint with Focus on Emerging Markets.

3. Bell's Focus on expanding Technological Capabilities in the Military Rotorcraft Domain Driven by Continued R&D Activity & Strategic Focus on the Asia-Pacific Region for Civil Segment Spearheaded by the Chinese Market.

4. Analysis & Strategic Insights into Russian Helicopter's Strategies & Plans to expand its Global Market Share to 20% through 2020 as against 14.2% for 2013 and Reposition itself as a leading Global Industry Player.

5. Potential significance of the opening & expansion of Chinese Low-Altitude Airspace and pursuit of other Civil Aviation Reforms as the potential window of opportunity for the Industry.

6. Significant Replacement Demand likely to originate from the Offshore Oil & Gas Exploration Sector over Medium Term, spearheaded by the Latin America region, likely to give a tremendous fillip to the civil helicopter segment across OEMs.

7. Analysis of Key, Upcoming U.S. Military Helicopter Programs, especially, Armed Aerial Scout (AAS) & JMR (Joint Multi-Role) TD Phase for the Future Vertical Lift (FVL) program with Analysis of Strategic Developments & Insights into Strategies of key competing OEMs.

8. Analysis of Key Industry as well as Technological Trends likely to shape industry's future.

5. 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/Military Helicopters & Rotorcraft Segment as well as General Aviation 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. Additionally, the report will also have immense value for educators looking for strategic analysis or inputs on the industry or on any of the industry OEMs.

6. 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.

7. 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.

+44 20 8123 2220
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