

Comparative SWOT Framework Analysis - 2015 - World's 4 Leading Aircraft Engine Manufacturers - Pratt & Whitney, GE Aviation, Rolls-Royce, Safran

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Abstracts

Strong Growth Projections for Commercial Aviation through the mid-2030s driven by Introduction of New, Highly Efficient Aircraft Programs by OEMs powered by Next Generation Propulsion Technologies:

The demand for commercial airplanes globally, projected to grow strongly over long term, is being driven by growing fleet replacement demand & continued fleet expansion across airliners globally propelled by a combination of significant growth in air traffic; driven by strong fundamentals & macroeconomic trends; and introduction of new aircraft programs by OEMs incorporating cutting edge technologies & technological innovations, especially, next-generation aircraft engines delivering an optimized operating economics with a 15%-20% enhanced fuel efficiency along-with significantly reduced emissions. Introduction of new engine programs by almost all key engine manufacturers featuring cutting-edge technologies & radical innovations has, in turn, been the most significant demand driver for the latest aircraft programs introduced by the OEMs.

The global aviation propulsion sector is on the brink of a technological leap, with decades of research on technological evolution by key industry OEMs transpiring into next generation of aerospace propulsion systems, which has been amongst the most significant drivers of replacement demand, underway across the commercial & regional aviation segments, with their optimized operating economics and significant reduction in emissions as well as noise levels.

Varied Technology & Innovation Focus across Engine Manufacturers with a pitched battle between GTF & LEAP:

Amongst engine manufacturers, CFM & Pratt & Whitney have been at the forefront of this R&D driven battle for supremacy of the regional & narrow-body segments of the aviation industry with their LEAP & Geared Turbofan (GTF) engine technologies respectively while Rolls Royce & GE wage a pitched battle in the wide body segment with increasing polarization of American & European supplier base over aircraft programs as indicated by Rolls Royce's recent wins as a single source supplier over Airbus' A350XWB & A330neo programs while GE won the coveted 777X program earlier.

The technological & innovation focus across engine manufacturers has been varying, ranging from Geared Turbofans to Material Science Innovations, aimed at delivering enhanced operating & fuel efficiencies. Pratt & Whitney, making a strong comeback to the narrow-body segment, dominated by CFM, has been focusing on & basing its overall technology strategy on the Geared Turbofan (GTF) technology while the segment leader in narrow body, CFM, has been focusing on incorporation of material science innovations over its LEAP engine program, which marks CFM's first major, comprehensive renewal of its core engine portfolio in over 4 decades. The LEAP engine program leverages GE's significant experience & capabilities in military aircraft engines domain, built over the decades, to match the enhanced efficiencies offered by the GTF technology which has made significant inroads in the regional segment of-late with success over a number of latest aircraft programs. Rolls Royce, too, has chosen to go the GTF way with its plans to develop two next-generation engine cores featuring GTF technology to augment its case & protect its 50% market share in the wide body segment and plans to re-enter the narrow body segment.

In the military aerospace segment, the support for continued development of the next generation jet engine with continued activity over a number of developmental programs which include: Advanced Variable Engine Technology (ADVENT), Versatile affordable advanced turbine engines (VAATE) and the Highly Efficient Embedded Turbine Engine (HEETE) programs which have been driving activity across engine manufacturers and are likely to potentially open up strategically significant growth avenues over long term.

Comparative SWOT Analysis Framework:

Against this backdrop, the report provides a comprehensive Comparative SWOT framework analysis on each of the World's 4 leading aircraft engine manufacturers. The framework analyzes the Strengths & Weaknesses of business jet manufacturers from a standalone as well as relative perspective based on a comprehensive analysis of Key, Strategic Business Aspects, which include:

Product Portfolio Analysis & its Strategic Positioning across Markets & Segments

Breadth & Depth of Presence across Markets & Regions

Analysis of overall Cost Base & Structure

Resource Base & Key Competencies

Profitability & Key Profit Sources

Capital & Ownership Structure

Key Competitor Analysis across Product Segments & Degree of Competitive Intensity

Competitive Market Positioning across Key Global Markets & Market Share

Overall Strategy Orientation & Focus, R&D Strategy, Capabilities & Key Programs being pursued

The framework subsequently analyzes & identifies potentially significant, niche growth opportunities & avenues and imminent as well as emerging threats for each key industry player based on their strategic product portfolio & market positioning, core strengths & weaknesses and overall strategy focus & orientation against the backdrop of emerging industry dynamics & trends. The report analyzes the overall strategic fit & the degree of strategic responsiveness of industry players to external environmental factors, which include, prevailing industry dynamics & emerging as well as latent industry trends, issues, challenges & potential risk factors to assess their ability to be able to derive further business growth by capitalizing on potential growth opportunities effectively while negating threats simultaneously over near to medium term.

Relevance & Usefulness: The report will be useful for

Key Inputs for Competitive Assessment, Analysis and Strategic Planning

Comparative Analysis of Core Strengths & Weaknesses for each of the 4 Key Industry Players

Identification & Analysis of Potential Growth Opportunities, Avenues & Threats

Analysis of Key, Emerging & Latent Industry Trends, Issues, Challenges & Potential Risk Factors

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

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

Strategic Perspective on the Industry's Medium Term Strategic Outlook

For Whom: Key Decision-Makers across Industry Value Chain

This Comparative SWOT Analysis report will be essential for those associated with and having strategic interest in the Global Aerospace industry, Commercial Aviation sector and any of these companies. The report 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, M&A Advisory Firms, Strategy & Management Consulting Firms, PE Firms, Venture Capitalists & all those associated with the Aerospace industry or any of these companies.

Highlight:

The report is comprehensive yet concise & compact at the same time; is custom-built for meetings & presentations, 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.

Key Takeaways: Enhanced Scope of Utilization & Application

This PowerPoint architecture based report provides high readability & ease of navigation besides enhancing the scope of retention, utilization & application of analysis with visual representation and incorporation of relevant images to support, supplement & enrich the analysis.

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- GE Aviation

Rolls Royce plc
Safran S.A.

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