

Comparative SWOT Framework Analysis - 2015 - World's 6 Leading Helicopter & Rotorcraft Manufacturers - Airbus Helicopters, AgustaWestland, Bell Helicopter, Boeing, Russian Helicopters, Sikorsky

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Abstracts

Introduction & Overview:

The report provides a Comprehensive & Insightful Comparative SWOT Framework Analysis on the world's 6 leading helicopter & rotorcraft manufacturers amid evolving industry dynamics with the military helicopters segment facing continued budgetary pressures across most traditional markets with new procurement activity mostly limited to fleet replacement with preference for proven, in-production & derivative platforms as against scratch up programs besides continued technology development over new, radical & next generation programs & platforms like the S-97 Raider & the V-280 Valor. The commercial helicopter segment, on the contrary, continues with steady growth driven by strong fundamentals & demand drivers.

Technological Evolution, Evolving Geopolitical Dynamics & Equations and Introduction of New Helicopter Programs by OEMs driving Demand for Helicopters amid Continued Budgetary Constraints:-

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 imminent, significant replacement demand for ageing military helicopters emanating from traditional as well as emerging markets and continued, strong R&D

activity driven technological developments & innovations are likely to be the key demand drivers over medium term for military helicopters & rotorcrafts despite ongoing, significant pressure on defense budgets across most traditional markets. The development of compound helicopter platforms, especially, the self-funded X2 program by Sikorsky, that is evolving rapidly as the S-97 Raider & forms the backbone of the SB>1 Defiant for the JMR-FVL program, and X3 by Airbus Helicopters; have already heralded the beginning of a new technological era as well as leap for military helicopters, in terms, of operational spectrum & capabilities.

Additionally, the Ukraine crisis & Russian expansionism in Eastern Europe has triggered concerns with respect to defense capabilities & has heightened threat perception amongst a number of European states, based in Northern & Eastern Europe, led by Poland & Norway, which are focusing on building up military capabilities rapidly to counter growing Russian threat in the region which is likely to drive an increase in defense spending across Northern & Eastern Europe over near term; as highlighted by Poland's latest \$3 billion multi-role helicopter program. Russia's defense budget is projected to grow to 4% of its GDP by 2016 while Chinese defense spending, too, continues to spiral up with China's growing regional influence in the APAC region driving defense spending across a number of key nations in the region; as reflected in Japan's recent V-22 purchase decision and significant investments towards strategic ISR assets besides growing export sales for Sikorsky's S-70/MH60R/S Seahawk program in the region.

The global civil helicopter & rotorcraft segment, on the contrary, 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 with North America projected to lead the demand for new civil helicopters. However, stalled economic recovery in the EU, slowing down of the world & BRIC economies with continued economic challenges in Brazil, Russian financial crisis and pursuit of structural reforms in China besides continued slide in oil prices as well as strengthening of US Dollar poses significant challenges over near term.

Against this backdrop, the report provides a comprehensive Comparative SWOT

framework analysis on each of the world's 6 leading helicopter & rotorcraft manufacturers. The framework analyzes the Strengths & Weaknesses of helicopter manufacturers from a standalone as well as relative perspective based on a comprehensive analysis of their 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 OEM 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 OEMs 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

Identification of Core Strengths & Weaknesses for each of the 6 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 Global Aerospace & Defense industry, Helicopter & Rotorcraft manufacturing 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 & Defense 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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