

# Comparative SWOT & Strategy Focus - 2014-2017 - World's 4 Leading Aircraft Engine Manufacturers - Pratt & Whitney, Rolls Royce, GE Aviation, Safran

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## Abstracts

### **1. Global Aviation Propulsion Sector on the Brink of a Technological Leap Driving Strong, Current Demand for Commercial & Regional Jets with Robust Growth Projections over Medium to Long Term**

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 that have been amongst the key drivers of significant replacement demand underway across the commercial & regional aviation segments of-late with their optimized operating economics besides significant reduction in emissions as well as noise levels.

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 (Leading Edge Aviation Propulsion) & Geared Turbofan (GTF) engine technologies respectively while Rolls Royce & GE wage a pitched battle in the wide body segment, especially, over the Boeing's 787 Dreamliner program variants with GE maintaining a significant lead over Rolls Royce while the 777X program has gone GE's way while Rolls Royce retains the Airbus's A380XWB aircraft program.

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, next-generation aircraft engines delivering an optimized operating economics with a 15%-20% enhanced fuel efficiency along-with significantly reduced emissions and enhanced aerodynamic efficiency. Introduction of

new engine programs by almost all key manufacturers featuring cutting-edge technologies & radical innovations have in turn been the most significant demand driver for the latest aircraft programs introduced by OEMs.

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.

## **2. Report Overview & Rationale:**

The report provides a comprehensive & insightful Comparative SWOT Framework Analysis and analysis of the overall near to medium term strategy focus for the leading 4 aircraft engine manufacturers in the global aerospace industry amid evolving industry dynamics with significant growth in demand for new airplanes across commercial & regional segments emanating from traditional as well as emerging markets with robust, long-term growth projections. The report analyzes the Strengths & Weaknesses of leading global engine manufacturers from a standalone as well as relative perspective based on a detailed analysis of their Internal & External environment respectively focusing on key, strategic parameters, which include: analysis of overall cost base & structure, resources & key competencies, profitability & profit sources, product portfolio analysis & its strategic positioning, key competitor analysis & degree of competitive intensity, competitive market positioning across key global markets, overall strategic orientation & analysis of key strategies & plans and R&D capabilities & programs being pursued. The framework after analyzing strategic positioning of industry players analyzes their overall strategic fit & the degree of strategic responsiveness 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.

### **3. Report Excerpts:**

The report analyses the Strategic Positioning, Priorities & Responsiveness besides providing Strategic Insights into the Key Strategies & Plans being conceptualized, formulated & pursued by the World's 4 Key Aircraft Engine Manufacturers (GE Aviation, Pratt & Whitney, Rolls Royce & 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.

#### **Excerpts from the Report:**

1. Analysis of Pratt & Whitney's Plans for Development of Next Generation, GTF Technology based Engine Configurations and a Differentiated Engine Architecture Targeted at the Wide Body Aircraft Segment.
2. Analysis of GE Aviation's overall Technology Strategy focusing on Material Science Innovations as a Key Differentiator & Significant Source of Competitive Advantage & Edge. Also, Analysis of GE's Plans for Expansion of its North American Industrial Base as GE Gears Up for the LEAP Engine Program.
3. Insights into Rolls Royce's Pursuit of a Comprehensive Engine Design Strategy aimed at Protecting Market Share in the Wide-body Civil Aircraft Engine Market and Plans to Re-enter the Narrow Body Aircraft Segment.
4. Analysis of Safran's Overall Strategy Spearheaded by Technological Innovation, Market Positioning, Domain Leadership and Financial Strength.
5. Strengthening and Extension of Global Sales, Service & Support Infrastructure by Industry Players with a Strong Focus on Emerging Markets, especially, 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.
6. Analysis of Strategies & Plans being Pursued by the OEMs to Offset Significant, ongoing Pressure on Defense Spending across most Traditional Markets.
7. Analysis of Key Global Aerospace Industry Trends(including Commercial, Military, Regional, Business & Helicopter Segments) and Key Technological Trends likely to Shape Industry's Future.(Additional Strategies, Plans & Trends available & analysed in

the report)

**4. Relevance & Usefulness:** Provides Strategic Insights & Inputs for Broader Strategic Planning, Strategy Formulation, Competitor Analysis & Decision-Making Processes.

**The report will be useful for:**

Key Inputs for Strategic Planning, Strategy Formulation & Decision-Making Processes

Identification & Analysis of Potential Growth Opportunities & Avenues

Competitor Analysis & Competitive Benchmarking Exercise

Strategic Perspective on Medium Term Strategy Focus and Business & Strategic Outlook for all Key Players

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

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

The report would be essential for those having strategic interest in the Global Aerospace Industry & will be especially useful for Key Decision-Makers, Top Management of OEMs & other Industry Players, Suppliers, Distributors, Vendors and other Key Players across the Industry Value Chain as well as Existing & Potential Investors and Stockholders, Industry & Company Analysts, M&A Advisory Firms, Strategy & Management Consulting Firms, PE Firms, Venture Capitalists & those associated with the Industry or having strategic interest in any of these companies.

## **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.

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