

# **Comparative SWOT & Strategy Focus - 2014-2017 - World's 5 Leading Business Jet Manufacturers - Gulfstream, Bombardier, Dassault, Cessna, Embraer**

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## **Abstracts**

### **1. Global Business Aviation Industry Treading Steadily on Recovery Path:**

The global business aviation Industry continues to recover steadily spearheaded by the large-cabin, long-range aircraft segment which accounted for almost 41% of the shipments in 2013 and registered record aircraft deliveries at a tremendous year on year growth rate of 18%. The light jets segment, on the contrary, continued with its contraction trend in 2013. However, the global business aviation industry is poised to register further growth and gain significant momentum over medium term with steadily improving global macroeconomic conditions & economic recovery underway across the United States & European Union and significant economic growth being registered by emerging markets led by China is likely to give a significant fillip to demand for new business jets.

### **Varied Strategy Focus & Variable Impact of Industry Bifurcation across OEMs:**

The strategy focus across business jet makers has varied considerably with the clear bifurcation of the market amongst two distinct segments over recent years with the heavy jets segment witnessing significant demand growth while light jets segment continues to take a beating which has had variable impact on industry OEMs. Thus, industry OEMs with their product portfolio concentrated & positioned in the upper half of the price & performance spectrum; dominated by Gulfstream & Bombardier followed by Dassault; are strategically positioned to harness these tailwinds effectively while those in the lower half face themselves to be in a significantly disadvantageous position.

Introduction of New Aircraft Programs by OEMs featuring Cutting-Edge Technologies- a

### Key Demand Driver & Growth Catalyst:

Additionally, introduction of new aircraft programs by industry OEMs featuring cutting-edge technologies that include: incorporation of enhanced & synthetic vision, latest radar systems providing enhanced situational awareness, advanced aerodynamics driving performance capabilities, incorporation of latest fuel efficient engines featuring a high bypass ratio & usage of other material science innovations and integration of onboard prognostics & diagnostics capabilities for aircraft as well as engines transpiring into enhanced aircraft performance, safety & operating economics that have been a stimulant & catalyst for driving replacement demand.

### Opening of Chinese Low-Altitude Airspace & Civil Aviation Reforms - Potential Window of Opportunity:

Further, strong economic growth momentum in China with the GDP sustaining a 7%+ growth rate & the opening as well as expansion of Chinese low-altitude airspace by the Chinese civil aviation authorities & the pursuit of proposed civil aviation reforms are likely to give a significant boost to the civil aviation sector with China projected to catapult itself to become the world's third largest market for business jets over the next decade which is likely transpire into a significant growth opportunity for industry OEMs, especially, with respect to the light jet segment that has been impacted severely over the years.

## **2. Report Overview & Rationale: Strategic Insights based on a Comparative SWOT Framework Analysis:**

The report provides a Comprehensive & Insightful Comparative SWOT Framework Analysis and analysis of key growth strategies & plans for the leading 5 industry OEMs in the global business aviation industry amid evolving industry dynamics with improving demand levels & utilization for business jets across traditional markets besides growing demand from emerging markets. The report analyzes the Strengths & Weaknesses of the OEMs 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 across product segments & degree of competitive intensity, competitive market positioning across key global markets, overall strategic orientation & analysis of Key Strategies & Plans, R&D Capabilities & Programs being pursued. The framework after analyzing strategic positioning of OEMs 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:**

1. Comprehensive Analysis of Bombardier's Strategy of Gradual Diversification of its Global Industrial Footprint, Significant Strengthening of Regional Presence in the Asia-Pacific and Plans to Take on Gulfstream for Leadership of the Global Business Aviation Market led by the Development of Global 7000 & 8000 Aircraft Programs.
2. Analysis of Gulfstream's Product Portfolio Strategies spearheaded by the G650, G650ER & G550 in the Ultra long range and the G280 in the super mid-size segment, Plans for Capacity Expansion, Continued Strategic Focus on Expansion of its Services Business and Strengthening of Global Presence & Support Network with specific focus on Emerging Markets, especially, China.
3. Analysis of Cessna's Product Portfolio Strategies led by Broadening of Product Portfolio with the Development of Derivative Products.
4. Insights into Dassault's Pursuit of the Technology & R&D Driven Product Differentiation Strategy and the Pursuit of Product Derivative Strategy spearheaded by the Falcon 7X, 5X & 8X Aircraft Family.
5. Reinforcement & Expansion of Global Service & MRO Support Footprint by Industry OEMs in-sync with utilization trends.
6. Potential Opening & Expansion of Chinese Low-Altitude Airspace & Pursuit of Reforms in the Civil Aviation Sector to be a Key Window of Opportunity for the Global Business Aviation Industry.
7. Analysis of Key Technological Trends Shaping the Future of the Global Business Aviation & Aerospace Industry.

**4. Relevance & Usefulness:** Provides Strategic Insights & Inputs for Broader Strategic Planning, Strategy Formulation, Competitive 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 Business Aviation 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 & enrich the analysis.

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Bombardier Inc.

Cessna Aircraft Company

Dassault Aviation

Embraer SA

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