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Comparative SWOT & Strategy Focus - 2014-2017 - World's 6 Leading Helicopter & Rotorcraft Manufacturers - Airbus Helicopter, AgustaWestland, Bell, Boeing, Russian Helicopters, Sikorsky

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Abstracts

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 effective 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. The continued spate of defense budgetary cuts across most traditional markets, however, continue to impact acquisition of new military helicopters and impede the development of new helicopter programs.

The global civil helicopter & rotorcraft industry segment, on the contrary, is witnessing a resurgence of-sorts post the global economic crisis of 2008, driven by the development of new helicopter platforms by OEMs featuring cutting-edge technologies offering enhanced performance capabilities while reducing operating economics significantly.

Other key demand drivers for the civil segment include, foray by OEMs into entirely new segments, especially, Super mid-size with the positioning of latest product platforms with significant growth in global oil & gas exploration activity, 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.

The U.S. spending on military helicopter acquisitions is projected to contract by half by 2018 as compared against the 2012 levels with the ongoing budgetary cuts. The same has been driving the demand for development of military variants of available civil helicopter programs by industry OEMs, as highlighted by the AgustaWestland's AW139M & AW169 family, Airbus Helicopter's EC225/725 SuperPuma/Cougar family & the Sikorsky's S92/H92 Superhawk twins. The DOD plans utilization of available, customizable helicopter platforms for optimized costs as against scratch up platforms with the proposal under its FY2015 budget request to use available AH-64E Apaches of the National Air Guards for scout role in conjunction with UAVs as a replacement of the existing OH-58 Kiowa Warrior fleet besides plans to divest & replace the TH-67 Creek trainer helicopter fleet with the in-production UH-72A Lakotas through procurement of 100 Lakotas through 2016.

In the civil helicopter segment, steady demand growth is projected over medium term with helicopter deliveries projected 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 as the world's second largest market for civil helicopters. Offshore oil & gas exploration sector besides law enforcement are likely to be the biggest drivers of fleet utilization globally over near term.

All industry OEMs, thus, are in the process of restructuring & realignment with enhanced focus on the civil segment while exploring & pursuing potential growth avenues in the military segment in the form of growing exports to international markets in order to balance the overall force field amongst the prevailing tailwinds & the headwinds across commercial & military segments respectively.

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 6 military & civil helicopter manufacturers in the global aerospace & defense industry amid evolving industry dynamics with steady demand growth in civil segment while the military segment faces headwinds emanating from budgetary pressures across traditional markets. The report analyzes the Strengths & Weaknesses of leading industry players 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 be able to assess their ability to derive further business growth by capitalizing on potential growth opportunities effectively while negating threats simultaneously over near to medium term.

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

For Whom: Key Decision-Makers across Industry Value Chain

The report would be essential for those having strategic interest in the Global Aerospace & Defense 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.

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.

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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