

Comparative SWOT & Strategy Focus - 2014-2020 - Top 6 U.S. Aerospace & Defense Companies - Lockheed Martin, Northrop Grumman, Boeing, General Dynamics, Raytheon, United Technologies

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Abstracts

The Aerospace & Defense industry globally is currently contrasted between a significant growth phase being witnessed by the global commercial aviation industry with record order backlog levels prevailing across key airframers while the defense segment faces a cyclical downturn marked by ongoing portfolio restructuring across key industry OEMs & continued industry consolidation with growing M&A activity amid continued pressure on defense spending across most traditional markets. The global aerospace & defense industry & most industry players are, thus, in the process of harnessing the alternate cyclicity of the commercial & defense segments effectively to partially offset the ongoing slump in the defense segment by leveraging the commercial segment's growth momentum while preserving the core competencies & capabilities of their defense businesses through maintenance of an optimized defense industrial base, in line with the prevailing industry vicissitudes and to navigate their way through.

The U.S. Aerospace & Defense industry is the largest in the world, driven & sustained by the U.S. Defense Budget, which accounts for over 40% of the global defense spending consistently with the United States continuing with the strategy imperative of maintaining its technological superiority supported by the most well developed defense industrial base globally. The U.S. based Aerospace & Defense industry players have thus been able to develop significant technological capabilities over the decades driven by continued R&D activity aimed at incessant technological evolution, have well developed industrial footprint supported by a deep supplier base based in North America and have significant cash reserves having supported U.S. & Allied war operations across Iraq & Afghanistan war theatres over the first decade of present

century.

The U.S. defense budgetary trend, however, has witnessed contraction of-late with the budget control act & sequestration coming into the equation which have led to & forced a reassessment & review of U.S. defense priorities amid the prevailing & emerging geopolitical dynamics & equation which, in turn, has prioritized defense spending across programs based on assessment & evaluation of strategic priorities, threat perception, risk reduction & cost optimization. This fastidious approach to funding programs has led to a spate of program cancellations & scope confinement over recent years with prominent examples being the U.S. Army's Ground Combat Vehicle (GCV) & Armed Aerial Scout (AAS) programs besides the USMC's Expeditionary Fighting Vehicle (EFV) program earlier.

Additionally, the U.S. based industry players have traditionally relied heavily on U.S. defense spending with a large number of them deriving almost over 80% of their annual revenues from sales to the U.S. Government consistently. However, there has been a significant growth in export focus & numbers across industry players of-late driven by the need to partially offset continued contraction in U.S. defense spending, a strong overarching U.S. Government focus on growing international defense exports, strong technological capabilities & superiority of U.S. manufactured defense systems and growing instability in present & emerging geopolitical dynamics, that have been a key driver of growing investments in military capabilities across nations & regions, as highlighted by the present state of affairs in the Middle East, growing Russian threat perception in Europe since the Ukraine crisis and a major shift in Japanese defense priorities & stance with China's rapidly growing military capabilities. The global industry dynamics are changing rapidly with growing share of China, Saudi Arabia & Russia in the Annual Global Defense Spending with China & Russia projected to overtake EU in terms of defense spending by 2015 while China's defense budget alone is estimated to be larger than France, U.K. & Germany combined by 2015. Further, a number of nations based in the Middle East region continue to register significant growth rate with respect to defense spending, led by Oman & Saudi Arabia. Additionally, the U.S. is contemplating plans to increase OCO funding to counter growing ISIL menace in Iraq alongwith European allies which is likely to translate into an increase in activity for the U.S. defense industrial base. Further, the United States is also likely to undertake a comprehensive review of its military footprint & deployment strategy in Europe as part of its FY2016 budget request preparation activities, amid growing Russian threat, which is likely to shape U.S. regional strategy over medium term.

The industry players are thus undertaking portfolio restructuring & realignment

leveraging strong cash positions to match emerging market dynamics besides optimizing their industrial footprint & cost base for enhanced operating efficiency and focusing significantly on growing international exports to partially offset U.S. defense budgetary pressures despite the surge in U.S. Dollar against most global currencies. OEMs with presence in & exposure to commercial aerospace segment have been in a relatively advantageous position with strong growth being witnessed by the commercial aviation segment. Additionally, niche growth opportunities still prevail across select defense domains with continued funding towards strategically significant programs & capabilities.

Against this backdrop, the report takes a macro view of the global aerospace & defense industry, and provides a Comprehensive & Insightful Comparative SWOT Framework Analysis on the 6 leading U.S. based Aerospace & Defense industry players besides providing comprehensive insights into the Overarching Strategy Focus and Key Strategies & Plans being conceptualized & implemented by them for the medium term horizon. The scope of analysis spans from analyzing the strategic positioning of each respective industry player and matching it against the prevailing & emerging industry dynamics to assess overall favorability of positioning. The report further analyses their core Strengths & Weaknesses 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.

Additionally, the report provides a comprehensive analysis of key & emerging trends, in addition, to providing strategic insights into the significant industry developments and analyzing overall dynamics in the global aerospace & defense industry.

Relevance & Usefulness: The report will be useful for

Strategic Planning, Competitive Analysis & Benchmarking Exercise

Comprehensive Strategic, Competitive Assessment & Analysis of each Company

Overarching Strategy Focus & Strategic Insights into the Key Strategies & Plans being pursued by each key Industry Player

Comprehensive SWOT Framework Analysis on each of the U.S. Aerospace & Defense Companies

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

Comprehensive analysis of Key and Emerging Industry Trends & Growth Opportunities

Analysis of Key Forces Shaping Industry's Future & their overall Dynamics

Strategic Perspective on the Industry's Medium to Long Term Strategic Outlook

Analysis of Emerging Industry Landscape and Key Issues & Challenges

For Whom:

The report is a niche, key & vital resource on the Business Strategy Domain given its unique disposition & strategic focus on leading U.S. based Aerospace & Defense Industry Players. The report would be quintessential for those having strategic interest in the Global Aerospace & Defense Industry or any of these companies & 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 Global 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.

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Strategic Industry Outlook

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