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Comparative SWOT & Strategy Focus - 2014-2020 - World's Top 8 Aerospace & Defense Companies - Airbus Group, BAE Systems, Boeing, Lockheed Martin, Northrop Grumman, General Dynamics, Raytheon, United Technologies

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Abstracts

The Global Aerospace & Defense industry at present is juxtaposed between strong tailwinds driving tremendous growth momentum in the commercial aerospace segment and continued headwinds in the defense segment, witnessing a cyclical downswing marked by defense budgetary cuts underway across most traditional markets. The global aerospace & defense industry & most industry players are, thus, in the process of harnessing the alternate cyclicality 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 commercial aviation segment continues to witness tremendous growth driven by the convergence of strong, long-term growth drivers and a technological leap with the emergence & rapid commercialization of next generation propulsion & other aerospace technologies that has transpired into record order backlogs for latest commercial aircrafts across airframers & engine manufacturers.

The defense segment, on the contrary, faces the paradox of rapidly advancing technological capabilities with limited funding to support & sustain their development & commercialization costs. The industry, thus, has witnessed fastidious budget allocation of-late across the U.S. & Europe based on strategic significance of programs, capabilities & technologies in the overall force structure and contextual analysis with the emerging threat scenario. Some key, big ticket programs have received congressional

green light of-late in the U.S., especially, the next generation bomber & engine programs, despite continued budgetary pressures. However, preference has been growing for low-risk, in-production platforms, instead of scratch up programs. Further, global industry dynamics are witnessing significant changes 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 Ukraine crisis 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. Russia's defense budget is projected to grow to 4% of its GDP by 2016 while defense budgets across other key nations based in the Asia-Pacific & Middle East regions, too, continue to witness significant growth presenting potential growth opportunities to leading global industry players. 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.

Most industry OEMs are in the process of restructuring their portfolios with focus on reinforcing commercial businesses to match emerging industry dynamics & realigning defense businesses with emerging budgetary scenario across segments while simultaneously optimizing their overall industrial footprint & cost base by leveraging operating, financial, resource & market synergies across their defense & commercial businesses effectively. Additionally, growing international exports as well as market presence & upgrading existing in-service hardware & systems with latest technologies delivering enhanced performance capabilities as well as reduced operational costs are amongst other key strategies being pursued by industry players.

Against this backdrop, the report takes a macro view of the global aerospace & defense industry, and provides a comprehensive Comparative SWOT Framework Analysis besides insights into Key Strategies & Plans for the 8 leading industry players for the medium term horizon. The report analyzes the Strengths & Weaknesses of companies 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 through a force field analysis in the global defense & aerospace industry.

Relevance & Usefulness: The report will be useful for

Strategic Planning, Competitive Analysis & Benchmarking Exercise

Comprehensive Strategic, Competitive Assessment & Analysis of each Company

Strategic Insights into Key Strategies & Plans being pursued by each key Industry Player

Comprehensive SWOT Framework Analysis on each of the Defense & Aerospace 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 the Industry’s Future & their overall Dynamics

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