

Embraer S.A.- Business Aviation Segment - Strategy Brief - Q1 2014 - Strategic Initiatives, Developments, SWOT, Trends & Outlook

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Abstracts

1. Overview & Rationale:

The report provides a holistic assessment as well as comprehensive analysis of the Business Activities, Strategic Initiatives, Strategic Measures, Business & Strategic Developments and Strategic Moves for Embraer SA for Q1 2014 and provides an analysis of how they integrate with & fit into the medium term strategic picture & overall business strategy against the backdrop of an evolving industry landscape witnessing the beginning of a shift & decentralization of demand & activity concentration for business jets segment away from North America with growing demand from Emerging Markets and ongoing economic recovery across North America & Western Europe amid a multitude of macroeconomic challenges as well as uncertainties.

2. Backdrop: Global Business Aviation Industry Continues to Make Steady Strides on Recovery Path:

The Global Business Aviation Industry continued steadily on the recovery path with the Business Jet shipments growing by 1% for 2013; standing at 678 units as against 672 for 2012 spearheaded by the large-cabin, long-range aircraft segment which registered record aircraft deliveries and accounted for almost 41% of the shipments in 2013 with a tremendous year on year growth rate of 18%, thus also underscoring the significance of aircraft billings over shipment numbers as the new indicator as well as correct measure of industry growth with the focus on value rather than mere volume. The total aircraft billings across the business & general aviation sectors grew by 24% in 2013 and stood at \$23.4 billion as compared against the industry peak & pre-crisis level of \$25 billion in 2008. In terms of markets, the North American market accounted for about 52% of total

business jet deliveries in 2013 as against 49% for 2012 with the decline in shipments in the European market.

The growth of the large-cabin, long-range segment has been extremely favourable for the industry's Top 3 OEMs, namely, Gulfstream, Bombardier & Dassault, who continue to grow their share of the global business jet market, especially, Gulfstream which has been able to catapult itself to the top with the ramping up of G650 production in 2013. Amongst OEMs, Bombardier led the industry pack in terms of deliveries while Gulfstream retained the top spot, in terms, of aircraft billings for 2013. The light & mid-size jet segments on the contrary continue with their contractionary trend. Fleet utilization levels for business jets, however, have remained decent driving growth for the MRO activity.

3. Scope of Analysis: Strategic Initiatives, Developments, Plans, SWOT, Key Industry Trends & Force Field Analysis

The report provides Key Insights into the Key Strategic Initiatives, Developments & Plans being pursued by Embraer SA. The report also includes an incisive SWOT framework analysis on the company; which is used extensively for an assessment of the internal as well as external business environment of an organization as part of the strategic planning process. The framework generates a snapshot of the company's inherent strengths & weaknesses as part of the internal environment assessment and outlines potential growth opportunities as well as threats as part of the external environment assessment.

The report concludes by providing comprehensive insights into the key industry trends, issues, challenges, risk factors besides identifying key driving & restraining forces & assessing their potential degree of impact through a force field analysis followed by industry outlook for 2014.

4. Relevance & Usefulness: Strategic Business Analysis, Planning & Decision-Making Process

The report provides insights & inputs to be incorporated into the broader strategic planning & decision making processes and will be essential from a competitive analysis standpoint as well.

The report will be useful for:

Competitive Assessment as well as Comprehensive Strategic Business Analysis

Assessment of degree of environmental responsiveness as well as strategic orientation

Gaining access to Key Inputs for Strategic Planning & Decision-Making Process

Identification of opportunities which could be capitalized upon

Identification of potential threats in the business environment

Analysis of and Insights into key Strategies & Plans being pursued by the company

Identifying & highlighting areas for Strategic Changes, Adjustments & Realignment

Gaining a Strategic Perspective on the Business & Strategic Outlook for 2014

Access to Key Industry Trends, Issues & Challenges, Risk Factors & Industry Outlook for 2014

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

The report would be essential for those having strategic interest in Embraer SA and the Global Business Aviation Industry & 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 & those associated with the Industry or the Company.

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: Enhances Scope of Utilization/Application with Visual Representation & Saves Time

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, immediate utilization & application of analysis with visual representation and incorporation of relevant images to support & supplement the analysis.

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