

# Global Defense & Aerospace Industry - Force Field Framework Analysis - 2014

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## Abstracts

### 1. Backdrop & Overview:

The report analyses & provides Key Insights into the Global Defense & Aerospace Industry through a Comprehensive, Quantitative Force Field Framework Analysis. The framework:

- Identifies Key Driving & Restraining Forces Impacting the Global Defense & Aerospace Industry

- Quantifies Strength, Magnitude & Potential Degree of Impact of each Driving & Restraining Force

- Assesses the Overall Dynamics & Interplay of Driving & Restraining Forces

- Generates an Overall, Quantitative Strategic Snapshot of the Industry Forces

The framework thus identifies key forces that are driving & restraining the industry and their overall dynamics in a quantitative format that provides useful inputs to be incorporated into the medium term strategic planning & decision-making process.

### 2. Industry Background

The Global Defense & Aerospace industry is currently in a transformational phase with defense budgetary cuts putting pressure on linear topline growth & mandating industry OEMs to focus on rationalization of cost base & operations to bolster profitability

besides stressing the need to reduce their degree of dependence on traditional markets significantly. Simultaneously, technological evolution has seen significant progress over recent years with significant technological developments, innovations & breakthroughs that have the potential to extend & broaden the performance spectrum & capabilities of defense hardware besides reducing the total cost of ownership through the operational life span which opens avenues for stimulating demand for replacement & upgrade.

However, budgetary pressures have led to a significant rise in competitive intensity for new defense contract awards as cost competitiveness over hardware's operating life-cycle becomes a critical & decisive parameter and have already started driving the industry on the consolidation path as highlighted by the recent spike in M&A activity.

The industry has responded tremendously & adapted well to the difficult budgetary scenario and most industry OEMs have been able to boost profitability through restructuring of their industrial base despite pressure on topline growth and have been able to realign overall business portfolio leveraging strong cash positions besides strengthening of focus on international markets. The General Aviation industry on the other hand has been making steady recovery with an improving global macroeconomic environment while the Commercial Aviation industry has been on strong growth trajectory driven by technological evolution and strong demand growth emanating from emerging markets.

## 2. Relevance & Usefulness: Provides Inputs for Strategic Planning & Decision Making Process

### **The report will provide & would be useful for:**

Strategic, Quantitative Snapshot on the Dynamics of Industry Driving & Restraining Forces

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

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

Gaining a Strategic Perspective on the Industry's Strategic Outlook for 2014

Gaining access to Key Industry Trends, & Insights; Crucial Inputs for Decision-

## Makers

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

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

### 4. 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.

### 5. 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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