

# **Global Defense & Aerospace Industry - Strategic Insights - 2014 - Key Industry Trends, Issues & Challenges, Growth Avenues & Strategic Outlook**

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## **Abstracts**

### **1. Overview:**

The report provides Strategic Insights into the Global Defense & Aerospace industry by analysing & providing comprehensive insights into the Key Industry Trends, Issues, Challenges & Potential Risk Factors that are shaping & likely to shape industry's growth progression over medium term amid the difficult defense budgetary environment & a difficult global macroeconomic environment. The report also provides key insights into the potential growth avenues for the industry which could be targeted and capitalized upon by key players across the industry value chain.

### **2. Backdrop: Global Defense Industry under Pressure amid High Magnitude Defense Budget Cuts while the General Aviation makes steady recovery & Commercial Aviation on Growth Trajectory:**

The allied operations & campaigns across Iraq & Afghanistan war theatres under Operation Iraqi Freedom and Operation Enduring Freedom post 9/11 drove the growth of defense industrial base across North America & Western Europe. However, with the winding up of allied operations and the scheduled withdrawal of troops from Afghanistan through 2014, ongoing spate of defense spending cuts & absence of any significant external threat; the activity across almost all key North American OEMs has been dropping with pressure on top-line across industry OEMs with 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.

The industry landscape has been evolving with the shifting of global dynamics and

under the pressure of significant defense spending cuts across most traditional markets. The industry has already started treading on the consolidation path as highlighted by the recent spike in M&A activity across industry amid a difficult & uncertain global macroeconomic environment marked by slow pace of ongoing recovery in Western Europe from the debt crisis and a multitude of economic challenges in the United States.

The global defense industry, thus, currently is juxtaposed between rapidly rising technological capabilities and the deteriorating overall economic conditions to sustain & support the same. The fallout has been evident and has been along the anticipated lines, in the form of cancellations & restructuring of a number of major, key defense programs amid an ongoing spate of budgetary cuts. The overall outlook for the industry is contractionary over medium term with most OEMs working towards implementing an array of strategies and plans aimed at partially offsetting the ongoing spending cuts revolving around:

Rationalization & Optimization of overall Cost Base & Industrial Footprint

Growing Focus on International Exports

Strategic Business Portfolio Realignment with focus on Commercial Segments & Growth Domains

Technological Innovations aimed at Stimulating Replacement demand

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 and have been able to realign overall business portfolio leveraging strong cash positions. 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.

3. Relevance & Usefulness: Provides Inputs for Incorporating into Broader Strategic Planning & Decision-Making Process

The report provides insights & inputs to be incorporated into the broader strategic

planning & decision making processes.

**The report will be useful for:**

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

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

Identification & Analysis of Potential Growth Opportunities & venues

Gaining access to Key Industry Issues, Challenges & Risk Factors

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

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

**4. 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.

**5. 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.

**6. 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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