

Global Strategy Brief - 2019 - Commercial Aircraft Engine Manufacturers - GE Aviation, Pratt & Whitney, Rolls Royce, Safran

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Abstracts

The Global Commercial Aircraft engines market has been in one of its longest golden phase propelled by one of the longest aviation super-cycles so far. The same has created a huge order backlog for the industry which is likely to translate into significant top line growth potential for the aviation industry value chain over the next decade. Next generation aviation turbofan engines, featuring a high bypass ratio and extensive usage of technological innovations, ranging from material science innovations to proprietary coatings etc. from the competing engine powerhouses have just recently entered service and are likely to form a major chunk of new deliveries over medium term given the composition of order backlog across aircraft OEMs. 2018 saw the Entry into Service of three new aircraft programs, led by, Boeing's 737 MAX 9, Airbus A321 LR and Embraer's E190-E2 sporting engines from both CFM International & Pratt & Whitney respectively.

The engine manufacturers are gearing up their global industrial base for a major production ramp up to meet delivery timelines with some transitioning from production of previous generation engines to latest engine programs. CFM International has a major task lined up ahead for itself as it makes the key transition from production of CFM56 engines to LEAP engines family by the end of decade. For Pratt & Whitney, managing teething troubles over the in-service GTF engines remains the key, near term priority. For GE, 2019 is going to be an important year with the world's largest turbofan engine, GE 9X, scheduled to enter flight test phase prior to its entry into service slated for 2020. Additionally, Boeing's proposed New Mid-market Airplane (NMA) dubbed the 797; Boeing's first scratch-up commercial aircraft program since 787 in 2003 with an estimated development budget at around \$15 billion; is going to be the key growth pie being looked at avidly by all engine manufacturers over near term with Boeing likely to

announce the program at the Paris Air Show 2019.

The technology landscape across industry is evolving radically with the development of hybrid-electric propulsion technologies for commercial aircrafts; aimed at reducing CO₂ emission levels drastically while scaling down operating costs substantially; likely to become a functional reality by the middle of the next decade with multiple industry teams across the globe laser focused on pursuing R&D on the electric propulsion technology which necessitates radical improvements in current generation battery technologies. The developments on the Urban Aerial Mobility front, however, are likely to give a further push to development & commercialization of distributed electric propulsion technologies. Further, developments on the supersonic air travel front, too, are likely to further expand growth avenues for the engine manufacturers as highlighted by the GE's decision to use CFM56 based engine core for development of propulsion system for Aerion's AS2 supersonic business jet, scheduled to enter service in the mid 2020s.

Against this dynamic as well as rapidly evolving industry and market backdrop, this Strategy Brief report provides a comprehensive & holistic analysis of the overarching strategy focus across engine OEMs and insights into the key strategies & plans being conceptualized, developed & pursued by these OEMs for the near to medium term horizon to navigate their way through the existing environmental challenges & uncertainty while looking to drive growth for themselves in a booming phase for the industry.

Relevance & Usefulness:

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:

Strategic Planning & Decision-Making process

Analysis of Near to Medium Term Strategy Focus and Key Strategies & Plans for Engine OEMs

Identification of & Insights into Potential Growth Opportunities & Avenues

Market Evolution & Demand Growth Projections over Medium Term

Analysis of Key Market, Industry & Technology Trends and Developments likely to Shape Future

Strategic Market Outlook, Evolution & Demand Growth Projections over Medium Term

For Whom:

The report would be quintessential for those having strategic interest & stakes in the Global Commercial Aircraft Engines market. The report will be extremely useful for Key Decision-Makers, Program Managers, Global Procurement Managers, Defense Contracting Executives & Departments, Top Management of Industry Players & Other Companies, Industry OEMs, Suppliers, Vendors, Associated Equipment Manufacturers and other Key Players in the Industry Value Chain.

The report will also be useful for existing & potential Investors, Industry & Company Analysts, M&A Advisory Firms, Strategy & Management Consulting Firms, PE Firms, Venture Capitalists, Financing & Leasing Companies, Researchers and all those associated with the industry/sector. 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.

Contents

SECTION - 1

Strategy Focus & Priorities - For all 4 Commercial Aircraft Engine Manufacturers
(including their JVs as well as Strategic Alliances)

GE Aviation

Pratt & Whitney Inc.

Rolls Royce Holdings plc

Safran SA

SECTION - 2

Key Strategies & Plans - GE Aviation, Pratt & Whitney, Rolls Royce, Safran (including
their JVs as well as Strategic Alliances)

Product Portfolio Strategies & Plans

Service Level Strategies & Plans

Technological and R&D Strategies & Plans

Market Specific Strategies & Plans

Corporate Strategies & Plans

Sales, Marketing & Branding Strategies and Plans

Manufacturing/Production Strategies & Plans

Business Growth Strategies & Plans - Organic & Inorganic

Financial Strategies & Plans

Acquisitions, Strategic Alliances & JVs

Other Strategies & Strategic Initiatives

SECTION – 3

Business Outlook for 2019 – Analysis – For Each Engine Manufacturer

GE Aviation

Pratt & Whitney Inc.

Rolls Royce Holdings plc

Safran SA

SECTION - 4

Global Commercial Aircraft Engines Market - Force Field Analysis - Analysis of Driving
& Restraining Forces and their Overall Dynamics

Driving Forces
Restraining Forces

SECTION – 5

Key Trends
Industry Trends
Market Trends
Technology Trends

SECTION – 6

Key Issues, Challenges & Risk Factors

SECTION – 7

Strategic Market Outlook – Commercial Aircraft Engines - 2018- 2036
Global Demand Outlook - Commercial Aircrafts – 2018-2037
Demand Forecasts for Commercial Aircraft Segments through 2037
Narrowbody
Widebody
Regional Jets
Demand Growth Projections for Commercial Aviation Turbofan Engines – In Units & Value
Demand Forecasts for Commercial Aviation Turbofan Engines through 2036
Demand Forecasts for Engines by Thrust Class through 2036 – In Units
Demand Forecasts for Engines by Thrust Class through 2036 – In Value Terms (In \$Billions)
Engine Delivery Forecasts by Key Geographic Regions through 2036 – In Units
Engine Delivery Forecasts by Key Geographic Regions through 2036 – In Value (\$Billions)
Engines Production Forecasts - in Units
Estimated Value of Projected Engines Production over the forecast period – In Value Terms

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