

Global Strategy Dossier - World's 15 Leading Defense & Aerospace Companies - 2015-2020 - Key Strategies, Plans, SWOT, Trends & Outlook

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Abstracts

The global defense & aerospace 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 after experiencing a phase of strong growth driven by the allied war on terror during the first decade of the present century. The global aerospace & defense industry & most industry players are, thus, in the process of harnessing the alternate cyclicity 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 Aerospace segment is in the middle of a significant growth phase, driven, primarily, by significant growth in air traffic, projected to grow at 5% CAGR over long-term and continued improvements in cargo traffic globally along with other strong, long-term growth drivers complemented perfectly by the introduction of new aircraft programs by almost all key industry OEMs featuring cutting-edge technologies, especially, propulsion systems along with a range of other incremental as well as radical innovations by key players in the global industry value chain which has been a key driver of major fleet renewals underway across airlines globally and has ultimately been transpiring into significant growth avenues marked by burgeoning & record order backlog positions for new, commercial aircraft programs across all key industry OEMs.

The embattled Defense segment, however, too, has some niche windows of growth

opportunities available, created, mostly by technological evolutions & radical innovations being pursued & delivered by the industry value chain driving the generational leap in strategic as well as operational capabilities while providing significant incentive through optimized operating economics for the impending need for replacement of legacy, cold war era systems & hardware, as evinced by the recent state of developments over the JMR-FVL (Joint Multi-Role, Future Vertical Lift), JLTV (Joint Light Tactical Vehicles) & the Next Generation, Strategic Bomber programs respectively and the emergence of the recent, self-funded developmental programs by OEMs.

Most industry OEMs are in the process of realigning their portfolio with focus on strengthening commercial businesses to match emerging industry dynamics by leveraging their strong cash positions 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 defense programs to target international customers aimed at keeping the production lines operational; being done, most noticeably, by Boeing over its F-18 Advanced Super Hornet & F-15 Silent Eagle programs; are amongst other key strategies being pursued by industry players.

Against this backdrop, the report takes a macro view of the global defense & aerospace industry, analyzes the strategic positioning of the World's 15 leading industry players with respect to the current & emerging industry dynamics through a comprehensive SWOT framework analysis and provides key, comprehensive insights into the key strategies & plans being conceptualized, developed & implemented by industry OEMs for the medium term horizon. 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 in the global defense & aerospace industry.

Key Strategies & Plans included in the Report for each Industry Player:

1. Business & Product Portfolio Strategies & Plans
2. Market Specific Strategies & Plans
3. R&D Strategies & Plans
4. Growth Strategies & Plans
5. Business and Corporate Strategies & Plans
6. Sales & Marketing Strategies & Plans
7. Production/Manufacturing Strategies & Plans

- 8. Financial Strategies & Plans
- 9. Analysis of Strategic Priorities & Imperatives

Key Excerpts/Findings from the Report:

1. Boeing's Strategic Product Portfolio Expansion & Plans for Sustained Leadership of the Global Wide-Body Aircraft Market. Analysis of Boeing's growing focus on International Markets & other strategic plans for its Defense business.
2. Analysis of Airbus Group's Strategy 2.0, Strategic Product Portfolio Offensive in the Commercial Segment, Plans to enhance Competitiveness in the Space Launch business & Continued Diversification of Global Industrial Footprint.
3. Bombardier's Restructuring Plans for its Aerospace Business, Continued Strengthening of Global Service & MRO Network & Rapid International Diversification Strategy.
4. Analysis of Lockheed Martin's Innovation Driven Growth Strategy, Plans to Grow Presence across International Markets Rapidly, Continued Portfolio Realignment & Adjacent Market Growth Strategy.
5. General Dynamics's Growing Technological Capabilities in the Commercial Airframe Business aimed at potential achievement of viable, environmentally acceptable and sustainable Supersonic Flight Capabilities through 2020.
6. Analysis of Embraer's Long-Term Strategic Plan & Business Diversification Strategy
7. Analysis of Pratt & Whitney's Long-Term Technology Strategy spearheaded by the Geared Turbofan Technology as the Mainstay and Strategic Plans for Expansion of Presence in the Wide Body Aircraft Segment over Medium Term.
8. Comprehensive Analysis of Roll Royce's Plans to Re-enter the Narrow-Body Aircraft Segment, Plans for Expansion of Existing Presence in the Wide-Body Aircraft Segment and Analysis of the Group's Long-Term R&D and Technology Strategy.

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 and the Global Defense & Aerospace Industry

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

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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Strategic Industry Outlook – Medium to Long Term

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