

Global Top 4 Commercial Aircraft Turbofan Engine Manufacturers - Annual Strategy Dossier - 2019 - Pratt & Whitney, Rolls Royce, GE Aviation, Safran

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Abstracts

The Global Commercial Aircraft Turbofan engines market has been in one of its longest golden phases propelled by one of the longest aviation super-cycle being driven by strong tailwinds with strong demand drivers and favorable macroeconomic factors. The same has created a huge order backlog for the industry 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. The industry has just seen the Entry into Service of three new aircraft programs in 2018, led by, Boeing's 737 MAX 9, Airbus A321 LR and Embraer's E190-E2 sporting engines from both CFM International & Pratt & Whitney respectively. Airlines profitability continues to be strong despite the volatility in global crude oil prices & pressures from escalating labor costs.

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. The technology landscape across industry, too, 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.

Report Excerpts:

1. 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.
2. Rolls Royce is facing significant pressures on profitability with efforts underway on development of next generation engine programs while tackling in-service issues on the Trent 1000 & 900 engine programs.
3. For Pratt & Whitney, managing teething troubles over the in-service GTF engines remains the key, near term priority.
4. 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.
5. 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.
6. Boeing's troubles with the grounding of the global 737 Max 8 aircraft fleet over issues with the MCAS system, leading to two crashes in a 5 month span, are likely to impact production output across the entire supplier base over near term with Boeing itself revising the production rate for the 737 program.
7. The ongoing spate of trade wars, with Boeing-Airbus trade subsidies spat adding further fuel to the fire with the opening of EU as a new front in the Trump initiated trade wars, poses a serious threat to world economic growth rate with IMF already projecting a slowdown in world GDP growth rate for 2019 & 2020.

Against this dynamic as well as rapidly evolving industry and market landscape, the 2019 edition of this annual publication 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 them for the near to medium term horizon to navigate their way through the environmental challenges & uncertainty while looking to drive growth for themselves in a booming phase for the industry.

Relevance & Usefulness:

Strategic Planning, Assessment & Decision-Making Processes

Competitor Analysis & Comparative Analysis of covered Industry Players

Identification of & Insights into Potential Growth Opportunities & Avenues

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

Analysis of Emerging Industry, Market & Technology Trends

Medium Term Strategic Outlook, Inputs on Market Evolution & Growth Projections

For Whom:

The report would be quintessential for those having strategic interest & stakes in the Global Commercial Aircraft Turbofan Engines market. The report will be extremely useful for Key Decision-Makers, Program Managers, Global Procurement Managers, 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.

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Safran SA

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