

Global Top 5 Business Jet Manufacturers - 2016-2020 - Bombardier, Dassault, Embraer, Gulfstream, Textron Aviation - Strategy Focus & Priorities, Key Strategies & Plans, SWOT, Trends & Growth Opportunities, Market Outlook

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Abstracts

The Global Business Jet market continues to face & brave a challenging, complex & uncertain global macroeconomic environment marked by ongoing political instability, conflict & war operations across some parts of the world, a growing threat from terrorism & extremism globally, significant downturn in the global energy sector impacting oil driven economies significantly and economic weakness as well as difficult conditions prevailing across key emerging economies with BREXIT being the latest event adding further to the uncertainty with all the factors collectively impacting the global demand for business jets which traditionally has a strong correlation with global economic cycles. The OEMs continue to face significant competitive intensity in a difficult market scenario and are engaged in a virtual pitched battle over pricing in a oversupply driven market scenario with additional pressures from pre-owned aircraft inventory. A sustained low oil price environment, however, has been favorable boosting fleet utilization & profitability across operators while driving aftermarket sales & services revenues for the industry OEMs. The global market for business jets registered a slight 1.6% gain in year-on-year deliveries for 2015 with a late comeback in the year. The market, however, has registered a 4.3% decline in new business jet deliveries for H1 2016 while registering a 19% drop in aircraft billings with the number standing at \$7.6 billion (for the Top 5 industry OEMs), thus, taking the market all the way back to the H1 2012 level effectively, in terms of shipments. A key trend, however, is the comeback made by the triad of light & medium jet segment focused OEMs, namely, Cessna, Embraer & Dassault, all of whom have gained ground, in terms, of aircraft billings for H1 2016 registering slight to moderate increases over H1 2015 numbers at the expense of

Bombardier which has witnessed a whopping 40% drop in aircraft billings along with a sharp decrease in overall aircraft deliveries as well.

The near term demand projections for business jets are somewhat less optimistic than earlier years with 2016 likely to be a difficult year for the industry amid a weaker global macroeconomic outlook and complex as well as challenging geo-political environment. Demand projections by Bombardier indicate towards a 10% decline in aircraft deliveries for 2016 pegged in the 540-560 aircraft range with services, especially, systems upgrade, MRO & aircraft customization likely to drive slight to moderate growth over near term. The market demand for business jets is likely to pick up significantly from 2018 onwards with strong, sustained growth projections for global business travel spending over near to medium term. The long term demand drivers & market fundamentals for business jets, too, remain intact, robust & firmly in place indicating towards sustained, steady demand growth for business jets over medium to long term. Additionally, the business jet market is poised for a major technology led transformation with the era of supersonic business jets likely to become a reality towards early to mid-2020s with a number of industry OEMs, led by Gulfstream & Aerion-Airbus, actively pursuing R&D programs aimed at development of a range of supersonic flight technologies capable of enabling feasible supersonic flights while meeting regulatory requirements simultaneously. The report also maps out as to how are the industry OEMs likely to be placed in the emerging market dynamics & scenario over medium term.

The industry OEMs, working with a long term view of the market, continue to focus on development & introduction of cutting edge technologies, products & solutions aimed at expanding capabilities, enhancing performance & optimizing operating costs while increasing safety, thereby, looking to capitalize effectively on demand resurgence likely during the later part of present decade. The OEMs have also been working actively towards expanding & reinforcing their geographic footprint, MRO services network as well as capabilities with focus on strengthening roots across key international growth markets. The report analyzes the near to medium strategy focus across key industry OEMs and also maps out as to how are the industry OEMs likely to be positioned in the emerging market dynamics & scenario over medium term.

Against this backdrop, the report analyzes the Overarching Strategic Focus & Priorities and provides comprehensive insights into the Key Strategies & Plans being conceptualized, formulated & implemented by the World's Top 5 Business Jet Manufacturers for the near to medium term horizon as the industry continues to face a complex, challenging & rapidly evolving global macroeconomic & geopolitical

environment. The initial sections of the report provide a snapshot & overview on the business operations & market positioning of each industry OEM while the SWOT framework analyzes the core Strengths & Weaknesses for each of the business jet manufacturers. The SWOT framework subsequently analyzes & identifies potential growth opportunities & avenues and imminent/emerging threats for each key industry OEM based on their strategic product portfolio & market positioning, core strengths & weaknesses and overall strategy focus & orientation. The concluding sections of the report provide insights into key & emerging market & technology trends, issues & challenges and risk factors. The report concludes by providing a Force Field framework analysis on the Global Business Jet Market and assessing the medium term Strategic Outlook for Business Jets along-with Inputs on Market Evolution & Growth Projections through 2025.

Relevance & Usefulness: The report will be useful for

Strategic Planning, Assessment & Decision-Making Processes

Identification of & Insights into Potential Growth Opportunities & Avenues

Competitor Analysis & Comparative Analysis of covered Industry OEMs

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

Medium Term Strategic Outlook, Inputs on Market Evolution & Growth Projections through 2025

Analysis of Emerging Market, Sector-specific & Technology Trends

Contingency planning for current Strategies & Programs

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

Analysis of Forces Driving as well as restraining the Industry & their overall Dynamics

For Whom: Key Decision-Makers across Industry Value Chain

The report will be essential & a key resource providing competitive advantage for those associated with and having strategic interest in the Global Business Jet Market. The report will be especially useful for Key Decision-Makers, Program Managers, Top Management of Industry Players & Other Companies, Industry OEMs, Business Jet Operators, Suppliers, Vendors, Technology & MRO Services Providers, Flight Simulator & other related 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 or any of the companies mentioned in the report.

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