

# **Global Top 5 Civil Helicopter Manufacturers - 2016-2020 - Airbus Helicopters, Bell, Leonardo Helicopters, Russian Helicopters, Sikorsky - Strategy Focus & Priorities, Key Strategies & Plans, SWOT, Trends & Growth Opportunities, Market Outlook**

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## **Abstracts**

The Global Civil Helicopter market continues to face & brace significant headwinds while witnessing anemic demand growth amid continued major downturn in the global energy sector which traditionally drives & accounts for over 40% of annual, global market demand for civil helicopters. Civil helicopter deliveries & billings have plummeted by 16% & 32.5% respectively for H1 2016 as against H1 2015 with crude oil prices continuing to stay low impacting the fleet renewal as well as expansion plans and fleet utilization levels across operators globally. The civil helicopter market continues to be impacted significantly by the prevailing inertia in the civil segment as industry OEMs face significant competitive intensity & pricing pressures in an oversupply driven market scenario accompanied by competitive pressures from used helicopter inventory with most key industry OEMs reporting a drop in revenues as well as profitability for the first half of 2016. Additionally, the general industry sentiment, too, is somewhat downbeat with the recent fatal crashes of prototypes over a couple of under development programs, which include, the Bell 525 Relentless and Finmeccanica helicopter's AW609, in addition, to the grounding of H225 Super Puma fleet post the fatal crash of another H225 in April 2016 with Airbus now frantically looking for a solution to fix persistent technical issues with the platform.

The near-term outlook for civil helicopters, thus, is difficult with the sector impacted significantly by the ongoing downturn and consolidation in the offshore oil and gas exploration sector besides a general weakness and uncertainty in the global macroeconomic environment with political instability & conflict across some parts of the

world along with growing threat from terrorism & extremism to most parts of the world while some other regions face difficult economic challenges with BREXIT vote outcome adding further fuel the prevailing environmental uncertainty. The long term view of the market, however, remains positive with expansion of the degree as well as scope of utilization of civil helicopters across a range of user segments; the imminent, radical generational leap in technology; with the development & commercialization of next generation technologies as well as tilt-rotorcrafts & compound helicopter designs for the civil segment, which is poised to transform the market landscape significantly over medium term and rapid projected growth in civil helicopter fleets as well as their overall spectrum of application across emerging markets; led by China, with the opening of its low altitude airspace; is likely to provide significant traction to demand over medium term.

Most key industry OEMs, thus, are realigning their overall, near term strategy focus towards military helicopter business with the global military helicopter market stabilizing as defense spending across most parts of the world regains traction & is poised to witness growth over near to medium term. Additionally, the OEMs are focusing on other segments in the civil market, led by, Corporate/VIP transport, General Utility and EMS/SAR to partially offset the ongoing demand slump in the oil & gas sector. The OEMs are also working towards expanding local roots across key growth markets globally to capitalize on potential growth opportunities more effectively and to drive growth from a long term perspective while they continue to invest significantly towards pursuit of R&D activities aimed at development of next generation technologies as well as helicopter platforms.

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 Civil Helicopter 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 helicopter 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 Civil Helicopter Market and assessing the medium term Strategic Outlook for Civil Helicopters along-with Inputs on Market Evolution & Growth Projections through 2020.

#### Report Excerpts:

Bell back onto the Drawing Board conceptualizing & scouting game changing designs as well as technologies for the medium term horizon – Analysis

Sikorsky planning to pursue international markets aggressively with the S-92 platform targeting VIP transportation segment

Airbus Helicopters steadily making deeper inroads into the Chinese & other key APAC based civil helicopter markets – Analysis

Increasing preference for & development of Common, Configurable Platforms across Military & Civil segments

OEMs Experimenting with Hybrid Propulsion Systems for Potential Civil Helicopter & Aircraft Applications

Crash Resistant Fuel Tanks for Civil Helicopters in the U.S. – Regulatory Mandate on the horizon & potential implications for the industry

Regulatory Streamlining towards Improved Airspace Integration required across North America & Europe with growing safety threats to Civil Helicopters & Aircrafts from Drones

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

Near to Medium Term Strategic Outlook, Inputs on Market Evolution & Growth Projections through 2020

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 edge for those associated with and having strategic interest in the Global Civil Helicopter market. The report will be especially useful for Key Decision-Makers, Top Management of Companies, OEMs, Fleet Operators, Suppliers, Vendors, Technology & MRO Services Providers, Flight Simulator & other Related Equipment Manufacturers 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 industry or any of the companies mentioned in the report.

Features, Benefits & Reasons to Procure:

Provides Macro View and Big Picture Quickly

Blend of Quantitative & Qualitative Analysis

Significant Time Savings

Visual Representation

Meetings & Presentation Ready Format

Superior & Enriched User Experience with Incorporation of Relevant Images

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