

Strategy Guide - 2015 - World's 4 Leading Aircraft Engine Manufacturers - Key Strategies & Plans - Pratt & Whitney, GE Aviation, Rolls-Royce, Safran

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Abstracts

The global aviation propulsion sector is on the brink of a technological leap with decades of research on technological evolution by key industry OEMs transpiring into next generation of aerospace propulsion systems that have been amongst the key drivers of significant replacement demand underway across the commercial & regional aviation segments of-late with their optimized operating economics besides significant reduction in emissions as well as noise levels.

Amongst engine manufacturers, CFM & Pratt & Whitney have been at the forefront of this R&D driven battle for supremacy of the regional & narrow-body segments of the aviation industry with their LEAP (Leading Edge Aviation Propulsion) & Geared Turbofan (GTF) engine technologies respectively while Rolls Royce & GE wage a pitched battle in the wide body segment, especially, over the Boeing's 787 Dreamliner program variants with GE maintaining a significant lead over Rolls Royce while the 777X program has gone GE's way while Rolls Royce spearheads the Airbus's A350XWB & A330neo aircraft programs as a single source engine supplier with increasing polarization amongst American & European OEMs as well as engine manufacturers.

The demand for commercial aircrafts globally is being driven by growing fleet replacement demand across airlines propelled by significant growth in air traffic, projected to grow at 5% CAGR through the early 2030s and technological innovations, especially, next-generation aircraft engines delivering an optimized operating economics with a 15%-20% enhanced fuel efficiency along-with significantly reduced emissions and enhanced aerodynamic efficiency. Introduction of new engine programs by almost all key manufacturers featuring cutting-edge technologies & radical

innovations have in turn been the most significant demand driver for the latest aircraft programs introduced by OEMs.

The technological & innovation focus across engine manufacturers has been varying, ranging from Geared Turbofans to Material Science Innovations, aimed at delivering enhanced operating & fuel efficiencies. Pratt & Whitney, making a strong comeback to the narrow-body segment, dominated by CFM, has been focusing on & basing its overall technology strategy on the Geared Turbofan (GTF) technology while the segment leader in narrow body, CFM, has been focusing on incorporation of material science innovations over its LEAP engine program, which marks CFM's first major, comprehensive renewal of its core engine portfolio in over 4 decades. The LEAP engine program leverages GE's significant experience & capabilities in military aircraft engines domain, built over the decades, to match the enhanced efficiencies offered by the GTF technology which has made significant inroads in the regional segment of-late with success over a number of latest aircraft programs. Rolls Royce, too, has chosen to go the GTF way with its plans to develop two next-generation engine cores featuring GTF technology to augment its case & protect its 50% market share in the wide body segment and plans to re-enter the narrow body segment.

In the military aerospace segment, the support for continued development of the next generation jet engine program and the approval for the USAF's next generation bomber program, with allocations to the tune of \$1 billion in the DoD's FY2015 budget request for the engine program itself, is likely to give a significant boost to the engine manufacturers and potentially open up strategically significant growth avenues over medium term.

Against this backdrop, the report provides comprehensive insights into the Key Strategies & Plans being conceived, formulated & implemented by the World's 4 leading Aircraft Engine Manufacturers to harness the significant potential demand growth for new commercial airplanes projected over long term.

RELEVANCE & USEFULNESS OF THE REPORT:

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, Competitive Assessment & Decision-Making Process

Comprehensive Strategic & Competitive Assessment and Analysis of Strategy Orientation for key Engine Manufacturers

Strategic Insights into key Business Strategies & Plans being pursued by each of the 4 key Industry Players

Gaining a Strategic Perspective on the Business & Strategic Outlook for all key players for 2015

Insights into Current & Emerging Industry Trends & Analysis

Insights into Key Industry Issues, Challenges & Risk Factors

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

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

Gaining a Strategic Perspective on the Industry's Strategic Outlook for 2015

FOR WHOM:

The report is a niche, key & vital resource on the Business Strategy Domain given its unique disposition & strategic focus on leading Global Aircraft Engine Manufacturers. The report would be quintessential for those having strategic interest in the Global Aerospace & Defense 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 Aerospace & Defense 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 Outlook for 2015

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