

# **Strategy Guide - 2015 - World's 6 Leading Helicopter & Rotorcraft Manufacturers - Key Strategies & Plans - Airbus Helicopters, AgustaWestland, Bell Helicopter, Boeing, Russian Helicopters, Sikorsky**

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## **Abstracts**

The evolving role of helicopters as significant force multipliers with their rapidly increasing capabilities, especially, with the rise of rotorcrafts, & their increasing indispensability for conducting a wide range of military operations & missions and the rapidly evolving nature of threat perception from symmetric to asymmetric has made their presence formidable with the battlefield boundaries becoming increasingly nebulous. The imminent, significant replacement demand for ageing military helicopters emanating from traditional as well as emerging markets and continued, strong R&D activity driven technological developments & innovations are likely to be the key demand drivers over medium term for military helicopters & rotorcrafts despite ongoing, significant pressure on defense budgets across most traditional markets which are placing significant emphasis on procurement of existing, in-service & derivative platforms and pursuing upgrades & modernization instead of funding scratch up, developmental programs. The development of experimental compound helicopter platforms, especially, the self-funded X2 program by Sikorsky & X3 by Eurocopter have already heralded the beginning of a new technological era as well as leap for military helicopters, in terms, of operational spectrum & capabilities.

The global civil helicopter & rotorcraft segment, on the contrary, is being driven by the development of new helicopter platforms by OEMs offering enhanced performance capabilities while reducing operating economics significantly, foray into entirely new segments, like, Super mid-size besides significant growth in global oil & gas exploration activity driven by growing oil demand from key Asian economies, an ageing global civil helicopter fleet deployed in the oil & gas exploration sector and growing demand from

the EMS, Law Enforcement & VIP Transportation segments, especially, across emerging markets. About 4,800 to 5,500 new civil helicopters are projected to be delivered globally through the 2014-2018 period with North America projected to lead the demand for new civil helicopters. However, stalled recovery in the EU & slowing down of the world economy besides stalling of Brazilian economy and infrastructure issues & political crackdown on conspicuous spending in China pose significant threats over near term.

Against this backdrop, the report provides comprehensive insights into the Key Strategies & Plans being conceived, formulated & implemented by the world's 6 leading helicopter & rotorcraft manufacturers to harness the significant, anticipated growth potential in the civil helicopter & rotorcraft segment over medium term while managing the cost base of their defense business effectively to partially offset budgetary pressures across most traditional markets through optimization of costs & leveraging significant operational, financial, resource & market synergies across civil & defense segments effectively.

#### **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 OEMs

Strategic Insights into key Business Strategies & Plans being pursued by each key OEM

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:**

This Strategy Guide report will be essential for those associated with and having strategic interest in the Global Aerospace & Defense industry and any of these companies. The report 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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