

# Annual Strategy Dossier - 2020 - Global Top 4 Military Aviation Turbofan Engine Manufacturers - Pratt & Whitney, GE Aviation, Rolls Royce, Safran

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## Abstracts

The Global Military Aviation Turbofan Engines market has been on a steady growth upswing phase led by resurgence of the great power competition & escalating geopolitical tensions amid brief disruptions to production & supply chains emanating from COVID-19's unexpected global outbreak. The launch & pursuit of two new, sixth-generation combat jet development programs on the old continent, by separate Franco-German (FCAS) and the British (Tempest) teams, is likely to provide the much awaited stimulus to the European defense industrial base that had so far been marred by the relentless waves of defense spending cuts for decades. The global defense spending reached the \$1.9 trillion level for 2019, growing by over 3% year on year to reach its highest level since the Cold war era, accounting for around 2.2% of the world GDP for 2019.

Amongst engine manufacturers, Safran & Rolls Royce have surely got a definite thumbs-up with the launch of new European combat jet programs. On the other side of the Atlantic, in the U.S., the world's largest defense market, the overarching development in military turbofans has been the ongoing development of the sixth generation engine under the AETP program, led by Pratt & Whitney & GE Aviation. This sixth generation engine is going to power the next generation of U.S. fighter aircraft programs while also providing the technologies repertoire to retrofit existing fourth generation fighter aircraft engines with the latest technologies as a potential force multiplier.

Pratt & Whitney has entrenched itself strategically in the U.S. military aviation market over decades with a huge in-service engines base. The continued ramp up of production rate of the F135 engine for the F-35 program under multi-year procurements means Pratt & Whitney and its supplier base on the program are going to remain

adequately occupied for the medium term while the upcoming B-21 Raider unlocks the next growth franchise program. The re-engineing of older generation military aircraft programs is the second leg of the military turbofans growth triad as shown by the success of the approach on some KC-135s re-engineing with the CFM56s earlier. The program to re-engine the venerable USAF's B-52 is a key growth avenue on the horizon which is likely to be another tight contest between Pratt & Whitney's PW800, GE's CF34-10 and Passport and the BR700 family from the Rolls Royce. The third and still nascent leg of the triad is going to be the small, attritable engines segment for niche, mostly unmanned applications.

The prevailing chaotic geopolitical environment; with growing U.S.-China tensions almost mirroring the phases of U.S.-Soviet Union cold war era; and continued resurgence of Russia as a revisionist military power on a clear ascend phase is going to ensure that defense spending is headed skywards over medium to long term across most parts of the globe despite encountering mild, near term pressures over COVID-19's massive economic fallout. The decimation of commercial aviation by the pandemic has meant engine manufacturers are now focusing their efforts & resources aggressively on the military side of the business to partially offset the huge impact while buffing out rough edges on the commercial side of things leveraging the elusive lean years before the industry gets airborne again.

#### Report Excerpts:

Launch of new, twin European next generation combat aircraft programs mean greener pastures ahead for Safran & Rolls Royce's military sides of business for the long term

The sixth generation engine for combat aircrafts, under the AETP program, led by Pratt & Whitney & GE Aviation, will be the game changer, growth engine propelling the next generation fighter aircraft programs

The AETP program is also likely to provide the technologies repertoire to retrofit existing fourth generation fighter aircraft engines with the latest technologies opening additional growth avenues for engine primes

The F135 engine program is going to remain as the core & anchor of Pratt & Whitney's military aviation business for a long time to come

The upcoming B-21 Raider unlocks the next growth franchise program for Pratt

& Whitney

The re-engining of older generation military aircraft programs is the second leg of the military turbofans growth triad

The small, attritable engines market for niche, mostly unmanned applications is going to be the third leg of the growth triad

Against this backdrop, the report analyses & provides comprehensive insights into the Top 6 Global Military Aviation Turbofan Engine Manufacturers with focus on a blend of quantitative & qualitative analysis. The report provides detailed analysis on Engine Manufacturers, including, Comprehensive Analysis of Key Strategies & Plans, product portfolio & financial analysis and SWOT analysis. The report also projects market evolution for Military aircraft turbofan engines over medium term with analysis of emerging market scenario, demand growth projections, key market & technology trends, issues & challenges and potential growth opportunities.

For Whom: Key Decision-Makers across Industry Value Chain

Key Decision-Makers

Defense Departments, Program & Procurement Managers

Top Management of Industry Players & Other Companies

Industry OEMs & Technology/Other Solutions Providers

Suppliers, Vendors and other Key Players in the Industry Value Chain

Associated Equipment Manufacturers & Technology Solutions Providers

Existing & potential Investors

Industry & Company Analysts

M&A Advisory Firms

Strategy & Management Consulting Firms

PE Firms, Venture Capitalists and Financing & Leasing Companies

Researchers and all those associated with the industry in general

Features, Benefits & Reasons to Procure:-

Quick Macro View and Big Picture Analysis

Blend of Quantitative & Qualitative Analysis for Strategic Planning Process

Detailed Analysis on Engine Manufacturers

Visual Representation enabling Easy Comprehension

Meetings & Presentation Ready Format for Quick Application

Superior & Enriched User Experience with Incorporation of Relevant Images,  
Graphs & Info graphics

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