

# Annual Strategy Dossier - 2021 - Gobar Top 4 Military Aviation Turbofan Engine Manufacturers - Rolls Royce, Pratt & Whitney, GE Aviation, Safran

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## Abstracts

The Global Military Aircraft Turbofan Engines market has been on a strong growth trajectory propelled by an unprecedented resurgence witnessed in defense spending over the recent years driven by the rapid evolution of geopolitical dynamics & equations with a major shake-up & whittling down of the traditional, rule-based world order with a militarily ascending China and a resurgent Russia. The Global Defense spending has been on a major upswing led by the return to great power competition amongst leading geopolitical powers spearheaded by the R&D led technological evolution. The realignment of U.S. defense spending focus on competing with near peer adversaries and maintaining its traditional overmatch over adversaries has accelerated the pace of replacement of ageing equipment marked by the award of several new defense contract awards over the recent years which remain a key focus area for the industry given their strategic nature, scale as well as scope & long term horizon. The rapid development of the B-21 Raider LRSB program apart from the contract awards for the T-7 Red Hawk Trainer and the MQ-25 Stingray UAS programs are prime examples & hallmark of this defense renaissance with many upcoming defense programs still in the offing, especially, the big ticket JMR-FVL program geared towards development of next generation rotorcrafts for the U.S. defense forces.

Defense spending has been on a sustained growth trajectory in the EU as well over recent years with steady increases witnessed in defense budgets across France, Germany and the U.K. auguring well for the joint Franco-German defense programs going forward with the European Aerospace & Defense industry witnessing a growing trend towards pursuit of joint defense development programs. The developmental efforts on the sixth generation combat aircraft programs in Europe have been led by the Dassault-Airbus team on the Franco-German joint FCAS program apart from the U.K.

which has been actively pursuing the ambitious, Tempest fighter aircraft program. The U.S. efforts on the 6th gen fighter have been led by the NGAD program.

#### Report Excerpts:

The engine manufacturers have geared up their global industrial base to ramp up production to meet this growing global demand for military aircrafts, led by combat jets, with technological evolution, changes in threat perception and with many parts & regions of the world currently embroiled in political instability, unrest as well as conflict. The defense business has assumed even more significance for the engine manufacturers as of late following the decimation of commercial aviation by the outbreak of COVID-19. The technology landscape across industry, too, is evolving radically with the development of sixth generation adaptive turbofan engines for combat jets in the U.S. under the USAF's AETD Program and enhanced Turbohaft engines for rotorcrafts under the U.S. Army's ITEP Program with Hypersonics rapidly emerging as the next promising growth wave for propulsion system manufacturers over medium term. Pratt & Whitney; deeply entrenched in the defense market anchored on the huge F135 engine program & as the sole powerplant provider on the upcoming B-21 Raider; has been prepping up actively for future with the development of a cost effective range of propulsion systems for hypersonic flights by building upon its iconic & proven J58 engine program which powered the SR-71 Blackbird decades ago. GE is actively eyeing the JMR-FVL program, having won the Army's ITEP program earlier, apart from being a key contender in the upcoming three-way battle for the re-engining of the in-service fleet of B-52s where it faces traditional arch-rival, Pratt & Whitney, in addition, to Rolls Royce.

The outbreak of COVID-19 pandemic globally in early 2020 has had an unprecedented impact on the world economy which has put tremendous pressure on government finances across most parts of the world with the same also likely to impact defense spending across traditional markets over medium term while defense budgets across nations in the Asia-Pacific region are projected to retain their original, pre-COVID growth trajectories. Further, strategic & long term programs are unlikely to be impacted by the economic pressures across most parts of the world going forward.

Against this backdrop, the report provides a comprehensive analysis of the strategic focus and key strategies & plans being contemplated & pursued by the Global Top 4 military aviation turbofan engine manufacturers for the near to medium term horizon.

**Relevance & Usefulness:** The report will provide answers to key questions, which

include:-

Which are the Fastest Growing Segments of the Global Military Aviation Turbofan Engines Market?

Which are the Strategic Areas being focused upon by the Engine Manufacturers?

Which are the Key Growth Strategies & Plans being conceptualized by leading Engine Manufacturers?

Which are going to be the Key Growth Programs & Markets for Military Aviation going forward?

Which are the Key Industry, Market & Technology Trends likely to Shape Future of Military Aircraft Engines?

For Whom: Business Leaders & Key Decision-Makers across Industry Value Chain

The report will be essential for Key Decision-Makers & Senior Industry Executives. The report will be especially useful for Program Managers, Procurement Managers, Airlines, Top Management of Industry Players & Other Companies, Industry OEMs, Suppliers, Vendors, MRO Services Providers, Technology & Other Services Solutions Providers 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 these companies.

## Contents

### SECTION - 1

Business Structure & Snapshot - For the Global Top 4 Military Aviation Turbofan Engine Manufacturers

- a) Founded
- b) Headquartered
- c) Business Segments
- d) Employees
- e) Product Portfolio and Key Competitors
- f) Market Capitalization/Ownership Structure
- g) Key Executives
- h) Shareholding/Ownership Pattern & Structure

### SECTION – 2

Financial Performance Analysis – Charts & Analysis: Based on Latest Available Financial Results

- 1. Revenue Base & Growth Trend
- 2. Revenues Split by Key Segments
- 3. Revenues Split by Key Geographic Markets & Regions
- 4. Gross Earnings & Margin Trend
- 5. Operating Earnings & Operating Margin Trend
- 6. Return on Sales Trend
- 7. Profitability Growth Trend
- 8. Cash Flow from Operations
- 9. R&D Expenditure Trend
- 10. CAPEX Trend

### SECTION – 3

SWOT Analysis

- Sources of Strengths which could be Leveraged
- Weaknesses to Overcome & Offset
- Opportunities to Capitalize Upon
- Threats to Mitigate

### SECTION – 4

Strategic Focus & Priorities

## **SECTION - 5**

Key Strategies & Plans - For the Engine OEMs

Product Portfolio Strategies & Plans

Service Level Strategies & Plans

Technological and R&D Strategies & Plans

Market Specific Strategies & Plans

Corporate Strategies & Plans

Manufacturing/Production Strategies & Plans

Business Growth Strategies & Plans - Organic & Inorganic

Financial Strategies & Plans

Acquisitions, Strategic Alliances & JVs

Other Strategies & Strategic Initiatives

## **SECTION – 6**

Global Military Aviation Turbofan Engines Market - Force Field Analysis - Analysis of Driving & Restraining Forces and their Overall Dynamics

Driving Forces

Restraining Forces

## **SECTION – 7**

Key Trends

Industry Trends

Market Trends

Technology Trends

## **SECTION – 8**

Key Issues, Challenges & Risk Factors

## **SECTION – 9**

Strategic Market Outlook - Global Military Aviation Turbofan Engines Market - 2020-2034

- 9.1 Analysis of Emerging Market Scenario
- 9.2 Global Defense Budgetary Expenditure Trend – Analysis
- 9.3 Defense Spending Levels across Key Markets - Top 5 & Top 10 Nations
- 9.4 Global Defense Spending Level - 2020-2025 – Projections
- 9.5 Key Upcoming Defense Programs & Growth Opportunities
- 9.6 Emerging & Game-Changer Technologies
- 9.7 Market Outlook & Growth Projections – Aviation Turbofan Engines – 2020-2034

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