

# Annual Strategy Dossier - 2023 - World's Top 5 Military Helicopter & Rotorcraft Manufacturers - Airbus Helicopters, Bell, Boeing, Leonardo, Sikorsky

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## Abstracts

Military helicopters have been an integral element of the force structure of armed forces globally given their indispensable & critical role in carrying out a broad range of missions; including, Utility & Troop Transport, Search & Rescue (SAR), Anti-Submarine Warfare (ASW), Attack & Reconnaissance and Heavy Lift; leveraging their unique operational capabilities and performance characteristics. The iconic military helicopters developed during the Cold War era, including, Black Hawk, Chinook and Apache are still in production & active service even decades after they first made their mark and having proved their mettle across numerous battlefields and combat theatres over decades. The advent of military rotorcrafts in 2007, starting with the V-22 Osprey, which was the world's first military tilt-rotorcraft, has proved to be a truly been a game changer for the military given its unmatched operational capability providing a clear overmatch, much higher cruising speed and versatility, as against conventional helicopters, while also bridging a key capability gap.

The development of second generation of tilt-rotorcrafts, under the Future Vertical Lift (FVL) program, is intended at development of eventual successors to the Black Hawk and Chinook under the Future Long-Range Assault Aircraft (FLRAA) and Future Attack Reconnaissance Aircraft (FARA) phases of the FVL program. The 2nd generation tilt-rotorcrafts, specifically the Bell V-280 Valor picked by the U.S. Army for FLRAA, provides a generational leap in capability with its 50% higher top speed of 300 knots+ and a way longer operating range, which is almost thrice that of Black Hawk, while carrying a 25% higher payload.

The FARA phase again has Bell and Sikorsky pitted against each other in an intense battle, especially, after the FLRAA phase went to Bell. The European Union (EU), too, is

looking at the future having launched the Next Generation Military Helicopter (NGMH) program, under PESCO, geared towards converting the next generation rotorcraft technologies into deployable solutions either as a retrofit over existing platforms or as a scratch-up platform in itself. U.K.'s upcoming NMH program is going to be a key, near term growth avenue for the industry OEMs. Switzerland's search for a heavy lift helicopter is still on the cards, wherein, Sikorsky's CH-53K Super Stallion will battle it out against the Chinook once again, much like the close contests witnessed earlier in Israel & Germany.

Further, the development of the next generation turboshaft engine, following the selection of GE's T901 under the U.S. Army's Improved Turbine Engine Program (ITEP), is a generational leap in propulsion technology for the next generation conventional helicopters & rotorcrafts, including, FLRAA, FARA as well for retrofitting existing Black Hawks and Apaches given that the T901 offers a 50% increase in power along with a 25% lower specific fuel consumption (SFC) and higher reliability as well as lower maintainability with its single spool architecture.

The demand for military helicopters has been on the rise since the second half of the previous decade which has further accelerated with the onset of tectonic geopolitical shifts following Russia's invasion of Ukraine in early 2022. Russia's antics in Ukraine have effectively led to a renaissance in defense spending globally and especially across Europe with surging defense budgets & overhaul of defense industrial base for the rapid production ramp-up required after decades of hibernation. China's rapid military build-up & emergence as the regional belligerent power in the Asia-Pacific has other nations in the region spooked up setting off one of the biggest arms race in the APAC. The U.S.-China faceoff is further escalating over China's ascent as a revisionist state with a rapid military build-up and steadily growing global economic & diplomatic influence with the U.S. officially terming China as the strongest & most serious, long-term rival globally.

Against this backdrop, the report provides insights into the key strategies & plans being formulated by the World's Top 5 Military Helicopter manufacturers & inputs to be incorporated into the broader strategic planning & decision making processes with focus on the overarching strategy focus across industry OEMs, analysis of key strategies & plans being formulated and a comprehensive SWOT analysis on them. Relevance & Usefulness of the report includes:

**Strategic Planning, Decision-Making and Market Analysis Purposes**

Identification of the degree of Congruence between Emerging Market Landscape & Strategy focus

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

Analysis of Forces Driving as well as restraining the Industry & their overall Dynamics through a Force Field Analysis

Analysis of Market Evolution with Medium Term Demand Growth Projections & Market Outlook

For Whom: Key Decision-Makers across Industry Value Chain

The report will be essential & a key resource for those associated with and having strategic interest in the Global Military Helicopter Market and/or the Global Aerospace & Defense Industry. The report will be especially useful for:

Key Decision-Makers across the Aerospace & Defense Industry

Defense Procurement Executives & Defense Departments

Program Offices & Program Managers of Defense Programs

Top Management of Industry OEMs, Players across Industry Value Chain & Other Companies

Suppliers, Vendors, Technology & Services Providers and other Key Players in the Industry Value Chain

Existing & Potential Investors

Industry & Company Analysts

M&A Advisory Firms

Strategy & Management Consulting Firms

Researchers and all those associated with the industry in general

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