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Comparative SWOT & Strategy Focus - 2020-2024 - North America's Top 5 Aerospace & Defense Companies - Boeing, General Dynamics, Lockheed Martin, Northrop Grumman, Raytheon Technologies

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Abstracts

Global Defense Spending has been on a major upswing over the recent years spurred by the return of the great power competition amongst the leading global powers. The focus has been on equipment modernization, capabilities revitalization and increased R&D outlays towards development of next generation & game changer technologies with the traditional as well as the revisionist powers looking for a potential overmatch & that much vaunted military edge. The continued development of military capabilities by China & the resurgence of Russia as a key regional power over the years have already induced a shift in the overall U.S. strategy towards competition with near peer adversaries as against counter-terrorism operations, which had been the focus earlier. This shift in strategic focus entails fast tracked procurement of systems & hardware to maintain numerical superiority, rapid development & deployment of next generation capabilities to plug existing & potential capabilities gaps and to retain the traditional, long standing strategic capabilities overmatch against adversaries along with continued R&D pursuits to maintain technological edge.

The defense industrial base across the U.S., Europe & most parts of the world has been on a renaissance over the recent years given the rapid transformation & evolution of geo-political dynamics & ongoing conflicts across some parts of the world. The modernization & upgrade of existing systems & hardware and their replacement with proven technologies and current, off the shelf solutions; well supplemented by scratch-up strategic programs; is providing significant growth opportunities to the U.S. defense industrial base as showcased by the initiation of a number of new, large ticket defense procurement programs over the recent years, which include, JLTV for replacement of

ageing & obsolete HMMWVs, Capabilities upgrade for the M1 Abrams MBTs & M2 Bradley, New contract Awards under AMPV & ACV 1.1 programs, award of development contracts for the next generation of rotorcrafts under the strategic Future Vertical Lift (JMR-FVL) program, the next generation strategic bomber B-21 Raider under the LRS-B program, USAF's UH-1N replacement program and the Navy's the replacement of its TH-57 trainer helicopter fleet & the replacement of its in-service destroyer & submarine fleets.

The same trend is being echoed across most other parts of the world with a similar focus as highlighted by the multi-billion dollar Australian Land 400 program spread across multiple phases and initiation of multiple modernization programs across Europe, most noticeably, the joint Franco-German Future Combat Air System (FCAS) & Main Ground Combat System (MGCS) programs and the comprehensive modernization of the British Land, Air & Naval Forces under multiple new programs.

Thus, with acknowledgement of strong external threat perceptions, there is political consensus on fast tracked modernization, upgrade & replacements which have been further corroborated by technological developments by the industry which are promising next generation capabilities at a workable & optimized TCO proposition. The global defense industrial base, thus, is readily gearing up with a spurt in activity and is looking forward to a long & much anticipated activity boom with most OEMs reinvigorating their industrial bases, in line with the age of disruptive technologies, led by digitalization, additive manufacturing, unmanned & optionally manned operating capabilities & artificial intelligence, for making the most of this current phase of demand upswing.

This return to the age of multi-polarity, marked by the onset of great power competition at the world stage stymieing the forces of globalization & marking the resurgence of the age of realism, has been offset by the onset of the global outbreak of the COVID-19 pandemic. The colossal & unprecedented economic impact of the pandemic are likely to put pressure on government finances across most parts of the world over near to medium term with defense budgets, especially across traditional markets, likely to be impacted over near term with the exception of strategic programs. The report analyzes the strategic positioning of leading global OEMs, their overall strategic focus and key strategies & plans focused on riding the long term growth wave while staying clear of & managing through the choppy waters over near term.

Against this backdrop, the report analyzes the Global Aerospace & Defense market in a post COVID-19 world and provides a comprehensive Comparative SWOT Framework & Strategy Focus Analysis on the North America's Top 5 Aerospace & Defense

Companies. The report analyzes the overall, Near to Medium Term Strategy Focus and provides insights into the Key Strategies & Plans being developed by the leading Global Aerospace & Defense Primes for the near to medium term horizon.

Relevance & Usefulness: The report will be useful for:

- Strategic Planning, Assessment & Decision-Making Processes
- Competitor Analysis & Comparative Analysis of covered Industry OEMs
- Identification of & Insights into Potential Growth Opportunities & Avenues
- Analysis of Near to Medium Term Strategy Focus and Key Strategies & Plans for all OEMs
- Identifying & highlighting areas for making potential Strategic Changes, Adjustments & Realignment

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 Aerospace & Defense Market. The report will be especially useful for Key Decision-Makers & Senior Industry Executives apart from Program, Project & Procurement Managers, Defense Procurement Departments & Executives, Suppliers, Vendors, Technology & MRO 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, PE Firms, Venture Capitalists and Financing & Leasing Companies, Researchers and all those associated with the industry in general.

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- Northrop Grumman Corporation
- The Boeing Company
- General Dynamics Corporation
- Raytheon Technologies

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