

# Comparative SWOT & Strategy Focus - 2023-2027 - U.S.A's Top 5 Aerospace & Defense Primes - Lockheed Martin, Northrop Grumman, Boeing, General Dynamics, Raytheon

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## Abstracts

Global Defense Spending has been on a clear upswing and is at a historic high now, having breached the \$2 trillion threshold in 2021, led by the whittling down of traditional, rule-based world order and the return of great power competition among leading geopolitical powers marked by sustained geopolitical instability, rising political tensions and conflicts. The Russia-Ukraine war has been a watershed moment, or 'Zeitenwende', geopolitically having brought back the spectre of war over Europe back to life after almost 3 decades following Russia's military resurgence and is showing no signs of abating even after heading into its second year. Russia's looming threat and ongoing antics in Ukraine have effectively led to a renaissance in defense spending 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 marked by Japan's redefined strategic posture for defense, India's rapid build-up of military capabilities to counter China's bellicosity and Australia's virtual defense renaissance besides the emergence of regional security cooperation frameworks, alliances & pacts, like QUAD & AUKUS, aimed at containing China. 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. The traditional West vs. East fault line & rivalry, thus, is visible clearly once again and has been driving defense spending & military rearmament globally

following the emergence of an unprecedented & rapidly evolving Russia-China cooperative axis, thereby, turning out to be a real windfall for the global defense industrial base.

#### U.S. Defense Industrial Base Geared towards Ramping-Up Production Rates:

The ongoing U.S. & NATO military assistance to Ukraine from existing stocks needing backfilling of inventories, the focus of U.S. defense spending towards maintaining traditional overmatch over adversaries focused on developing next generation capabilities through accelerated R&D pursuits and the need for replacement of ageing defense equipment with next generation systems & technologies have collectively been driving the significant increase in investment outlay towards defense backed by steady increases in U.S. defense budget over the recent years. A number of new, large-scale defense contracts of strategic nature, scale, scope & long term horizon have already been initiated or awarded over the recent years, including, the B-21 LRSB, JLTV, FVL, NGAD and the Virginia & Columbia class submarine programs while many more are in the offing, including, the U.S. Army's OMFV program to replace Bradleys and the development of Hypersonic weapons for the USAF & the USN.

The defense industrial base across the U.S. is gearing up to rapidly ramp-up production rates over near term to backfill depleting U.S. & NATO allies' stockpiles of munitions, missiles & weapon systems following the extraordinary rate at which they are being used in Ukraine, given that almost 13 years worth of Javelin & Stinger stocks have already been utilized, and to meet growing international demand for them following the return of the era of great power competition. The global defense spending, thus, is projected to reach the record \$2.5 trillion level by 2027 following a virtual defense renaissance globally with the industry gearing up to ramp up production rates to unprecedented rates & levels over near to medium term.

#### Supply Side-Led Market Scenario:

The near-term outlook for the Aerospace & Defense industry contrastingly is going to be dominated by the supply side for a change and the situation there could be termed as difficult, complex & challenging marked by supply chain disruptions, bottlenecks, constraints & labor shortages in an uncertain global macroeconomic environment marked by high inflation levels & monetary policy tightening underway by the Fed to contain it. The situation has been gradually ameliorating but is likely to hinder plans being chalked out by the industry OEMs to ramp up production rates to the levels being anticipated over near term, as is clearly visible in the case of commercial aviation. The

emerging geopolitical challenges, conflicts & tensions and ongoing power plays are likely to provide significant growth opportunities to the U.S. aerospace & defense industry over near to medium term with defense budgets across most regions & nations headed northwards.

Against this backdrop, the report analyzes & provides:

The report provides comprehensive insights into the Top 5 U.S. Aerospace & Defense industry OEMs with focus on a blend of quantitative & qualitative analysis. The report provides detailed analysis on A&D Primes, including, comprehensive analysis of business portfolio and strategic market positioning, overall strategy focus, key strategies & plans for medium term, financial analysis and a detailed Comparative SWOT analysis against the backdrop of emerging rapid shifts in the geopolitical dynamics, equations & landscape and technological leapfrogging. The report also projects market evolution for the global A&D market over medium term with analysis of emerging market scenario, defense spending growth projections, key market & technology trends, issues & challenges, key growth domains and potential growth opportunities.

1. Overall Strategy Focus & Key Strategies & Plans being chalked out by the Top 5 U.S. Aerospace & Defense companies
2. Insights into key industry, market & technology trends likely to shape the future of the Global Aerospace & Defense industry over medium term
3. Comparative SWOT Analysis and Outlining of emerging, potential growth opportunities
4. Identifies key driving & restraining forces impacting the industry & assesses their potential degree of impact through a comprehensive force field analysis
5. Provides an overview of key, upcoming U.S. defense programs
6. Analysis of U.S. Defense Budget & overall Budgetary Trend across Key Nations
7. In-Focus, Emerging, Game-Changer Technologies
8. Comprehensive outlook & medium-term demand growth projections for the U.S. and Global Aerospace & Defense industry

## Relevance & Usefulness:

The report provides insights & inputs to be incorporated into the broader strategic planning & decision making processes:

### Strategic Planning & 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 U.S. and/or 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

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

PE Firms, Venture Capitalists and Financing & Leasing Companies

Researchers and all those associated with the industry in general

## Contents

### SECTION - 1

Business Structure & Snapshot – For each of the Top 5 U.S. Aerospace & Defense Companies

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

### SECTION – 2

Financial Performance Snapshot - For each Industry OEM

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
11. Order Intake Trend
12. Order Backlog Position & Growth Trend

### SECTION – 3

SWOT Analysis – For each of the Top 5 Industry Players

- Strengths to be Leveraged
- Weaknesses to be worked on
- Opportunities to be capitalized upon
- Threats to be negated & mitigated

**SECTION – 4**

Comparative Analysis of Strengths

Lockheed Martin Corporation  
Northrop Grumman Corporation  
The Boeing Company  
General Dynamics Corporation  
Raytheon Technologies

**SECTION – 5**

Comparative Analysis of Weaknesses

Lockheed Martin Corporation  
Northrop Grumman Corporation  
The Boeing Company  
General Dynamics Corporation  
Raytheon Technologies

**SECTION – 6**

Strategy Focus across OEMs – Near to Medium Term – For the Top 5 U.S. A&D Primes

Lockheed Martin Corporation  
Northrop Grumman Corporation  
The Boeing Company  
General Dynamics Corporation  
Raytheon Technologies

**SECTION – 7**

Analysis of Key Strategies & Plans for the A&D OEMs

Analysis Coverage:

Business and Product Portfolio Strategies & Plans  
Market, Segment, Domain & Program Specific Strategies & Plans  
R&D Strategies & Plans  
Growth Strategies & Plans  
Business and Corporate Strategies & Plans  
Sales & Marketing Strategies & Plans  
Production/Manufacturing Strategies & Plans  
Financial Strategies & Plans

Portfolio Adjustment & Realignment based on Acquisitions, Strategic Alliances & JVs  
Other Strategies & Strategic Initiatives

## **SECTION – 8**

Global Aerospace & Defense Industry - Force Field Analysis - Analysis of Driving & Restraining Forces and their Overall Dynamics

Driving Forces

Restraining Forces

## **SECTION – 9**

Key Trends

Industry Trends

Market Trends

Technology Trends

## **SECTION – 10**

Key Issues, Challenges & Risk Factors

## **SECTION – 11**

Latest & Upcoming U.S. Defense Programs – Program Factsheets & Analysis

Program Size

Scale & Scope

Competing OEMs

Program Stage & Status

Contract Awards

Latest Developments

Upcoming Milestones

Program Outlook

## **SECTION – 12**

Strategic Market Outlook – Global Aerospace & Defense Market - 2023-2027

10.1 Analysis of Emerging Market Scenario for Aerospace & Defense

10.2 U.S. & Global Defense Spending Trends

10.3 Top 5 & Top 10 Defense Spending Nations

10.4 Market Outlook & Growth Projections

10.5 Global Defense Spending - Trends & Projections - 2023-2027

10.6 Global Defense Spending & Growth Rates for Key Regions

U.S.

Europe

Asia-Pacific

Middle East



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