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# European Aerospace & Defense Industry - 2021-2022 - Strategy Dossier on Top 5 Industry OEMs - Airbus, BAE Systems, Leonardo, Rolls Royce, Safran

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## Abstracts

Global Defense spending has been on a major upswing led by the resurgence of great power competition among leading geopolitical powers and spearheaded by R&D-led technological evolution. The realignment of U.S. defense spending, the largest in the world, with renewed focus on competing with near peer adversaries while sustaining traditional overmatch over adversaries, has accelerated the pace of recapitalization of ageing equipment with the award of several new defense contract awards over the recent years & many others in the pipeline. The European defense industrial base, too, has seen a spurt in activity over the recent years spurred by a heightened threat perception following Russian resurgence & the subsequent acquisition of Crimea apart from the earlier mandate of boosting defense spending to 2% of GDP for NATO member states.

The transition of the traditional world order towards multi-polarity, marked by the return of great power competition and escalating geopolitical tensions, has effectively heralded a renaissance for the Global Aerospace & Defense industry over the recent years with defense spending on the surge. The rapid build-up of military capabilities by China and resurgence of Russia on the world horizon has effectively spiraled up defense spending across most regions & parts of the world. The global defense spending reached the $1.98 trillion level for 2020 growing by over 2.6% year on year for 2020 & 3% for 2019 echoing the Cold war-era trend.

Defense spending in Europe has witnessed an upswing over the years to provide for upgrade & modernization recapitalization of ageing equipment as well as new, next generation equipment. The modernization of French Leclerc tanks and the British Challenger tanks is already underway while the programs for procurement of IFVs &

other armored troop transport vehicles are also being pursued actively across the continent. Poland's outlining of latest plans for procurement of U.S. M1A2 Abrams MBTs is a clear sign of the prevailing heightened Russian threat perception. Defense spending has been on a sustained growth trajectory in the EU as well with the French defense budget for 2021 registering an increase over 2020 in line with France's latest military program law through 2025 despite the pandemic and economic pressures.

The German defense spending too is poised for a 3.9% increase for 2021 and is likely to remain stable through 2024 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 equipment development programs with the hallmark of the same being the Franco-German FCAS and the MGCS programs. The European continent is also host to two sixth generation fighter jet development programs being spearheaded by the FCAS & Tempest programs respectively.

The demand side growth stimulus, being led by changing geopolitical equations & dynamics, is being conjoined by the technological advancements & evolution on the supply side, spearheaded by the industry, which, too, is incentivizing the replacement of legacy defense hardware worldwide with next generational equipment marking a quantum leap in performance & capabilities while offering an optimized total cost of ownership. The European Defence Fund (EDF), under the European Defense Industrial Development Programme (EDIDP), too, is facilitating the development of next generation technologies under a collaborative & cooperative approach geared towards Europe’s strategic autonomy by fostering the competitiveness & technological advancement of Europe’s defense industrial base.

The ongoing COVID-19 pandemic globally has had an unprecedented impact on the world economy and has put tremendous pressure on government finances across most parts of the world. The same is also likely to have a slight impact on defense spending over near term. However, strategic & long term programs are unlikely to be impacted by the same across most parts of the world going forward.

Against this backdrop, the report analyses & provides comprehensive insights into the Europe's Top 5 Aerospace & Defense Industry OEMs with focus on a blend of quantitative & qualitative analysis. The report provides detailed analysis on Top A&D Primes, including, comprehensive analysis of overall strategy focus, key strategies & plans for medium term, product portfolio & financial analysis and a detailed SWOT analysis. The report also projects market evolution for the A&D industry 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.

Report Excerpts:-

1. Airbus poised to challenge Boeing’s traditional dominance in the freighter market with the latest launch of A350F. Airbus also plans to ramp-up production rates for narrow-body aircrafts with improving market scenario across the U.S. and Europe
2. Tempest program, International defense exports, Pursuit of new defense programs in the U.S. market (with key focus on land systems) and development of advanced technologies form the quartet of BAE Systems’ growth quadrilateral for medium term
3. Leonardo looking to make deeper inroads into the U.S. Defense market following the recent string of successes on the military helicopters front apart from playing a key role in European technological advancement
4. Rolls Royce’s Growing Focus on Sustainable Aviation Propulsion Geared for Long Term
5. Safran’s Development of Open Rotor Propulsion Technology for Aviation, in collaboration with GE, under the RISE Program and Strong Focus on the Emerging UAM Market

Relevance & Usefulness: The report will be useful for:

- Strategic Planning & Decision-Making Processes
- Identification of & Insights into Potential Growth Opportunities & Avenues
- Key Growth Domains, Markets and Opportunities
- Key Upcoming, Strategic Defense Programs - Overview
- Defense Budgetary Trend and Defense Budgetary Spending Levels across Key European and Other Defense Markets Globally
- Identifying & highlighting areas for making potential Strategic Changes, Adjustments & Realignment
- Overview of Key, Emerging & Game Changer Technologies that are likely to Shape the future

For Whom: Key Decision-Makers across Industry Value Chain

The report would be quintessential for those having strategic interest in the European/Global Aerospace & Defense Industry. The report will be extremely useful for Key Decision-Makers, Program Managers, Global Procurement Managers, Defense Contracting Executives & Departments, Top Management of Industry Players & Other Companies, Industry OEMs, Suppliers, Vendors, Associated Equipment Manufacturers 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. The report is comprehensive yet concise & compact at the same time; is custom-built for meetings & presentations, being built on the Microsoft PowerPoint platform; in addition, to being a ready self-reckoner as well as a quick reference guide driving, enabling & ensuring prompt and informed decision making.

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