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Europe's Top 5 Aerospace & Defense Companies - Annual Strategy Dossier - 2019 - Airbus, BAE Systems, Leonardo, Rolls Royce, Dassault

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Abstracts

The European defense industrial base has been on a renaissance of sorts over the recent years driven by the radical transformation of geopolitical dynamics and equations with the dismantling of traditional rule based world order and the transition away from the typical unipolar world, which had prevailed since the end of Cold war. The same has been further exacerbated by the Trump led U.S. administration’s squandering of the traditional global leadership role under the “America First” policy which has led to realignment of relationships with the key NATO & other allies with the mandate to increase defense spending to the 2% level of GDP. The defense spending across most parts of the world has been on a steady upswing over the past couple of years and is likely to maintain that course over near term. Further, the resurgence of Russia as a key regional power over the years and the emphatic display of its capabilities across Crimea & Syria and the development of cutting edge next generation weapon systems has provided enough incentives & created a sense of urgency amongst most European states to review and update their defense capabilities.

The U.K.’s exit from the EU, too, has accelerated as well as catalyzed defense & security cooperation amongst the remaining EU member states with the initiation of joint development programs, most noticeably, the Franco-German Future Combat Air System (FCAS) project entailing the development of a common next generation fighter jet program. In the land systems domain, the contemplation of a joint Franco-German Main Ground Combat System (MGCS) to replace the existing German Leopard 2 and French Leclerc Main Battle Tanks (MBTs) is in the offing. These multi-billion dollar joint defense programs, which are currently in the very initial stages, are likely to provide a lot of traction to the European defense industrial base over long term.

On the Commercial Aerospace front, the Global Commercial Aircraft market continues to be in the super cruise mode with the longest, uninterrupted aviation super cycle being propelled by strong tailwinds with strong demand drivers and favorable macroeconomic factors driving order intake across the industry value chain which is likely to translate into strong, sustained top line growth for the industry over the next decade as it gears up for disciplined operational execution. The OEMs are focused strongly on ramping up aircraft production rates through the next decade to meet delivery schedules with production output on most key aircraft programs going up. The technology landscape across industry, too, has been evolving radically with hybrid-electric propulsion technologies for commercial aircrafts; aimed at reducing CO2 emission levels drastically while scaling down operating costs substantially; likely to become a functional reality by the middle of next decade with active R&D initiatives being pursued by the industry. Additionally, resurgence of supersonic air travel & the emergence of Urban Aerial Mobility are likely to bring the next wave of disruptive technologies to the market by the middle of next decade.

The modernization & upgrade of existing defense hardware and replacement of existing platforms with ready, off the shelf solutions continues unabated across most parts of the world and is providing significant growth avenues for the European aerospace & defense companies, which have traditionally derived a substantial proportion of their revenues from international exports. 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 affordable TCO. The European defense industrial base, thus, is readily gearing up with a spurt in activity after a long phase of being dormant and is looking forward to a long & much anticipated activity boom with most OEMs reinvigorating & readying up their industrial bases for the action.

Report Excerpts:

1. Realignment of U.S.-EU Relations under Trump & palpable Indifference for Traditional NATO Allies driving Renaissance of European Defense Industrial Base
2. Resurgence of Russia as a Significant Threat Driving Up Defense Spending across Europe
3. Evolution of Threat Landscape & Development of Next-Generation Technologies Driving Modernization
4. BREXIT accelerating as well as catalyzing defense & security cooperation amongst remaining EU member states with the initiation of a number of next generation, Joint

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Defense Development Programs
5. Commercial Aviation SuperCycle providing strong anchor & leverage to the A&D industry to develop defense side of business
6. Significant International Export Opportunities for European A&D OEMs
7. The ongoing wave of protectionism & the spate of trade wars, with Boeing-Airbus trade subsidies spat adding further fuel to the Fire with the opening of EU as a new front in the Trump initiated trade wars, poses a serious threat to world economic growth rate with IMF already projecting a slowdown in world GDP growth rate for 2019 & 2020.

Against this dynamic & rapidly evolving market & industry landscape, the 2019 edition of this annual publication provides comprehensive analysis and key insights into the Strategies & Plans being conceptualized & implemented by the Europe's Top 5 aerospace & defense companies for the near to medium term horizon as the industry braces up for a significant growth phase. The report is unique with reference to its core focus on and deep qualitative analysis of strategies & plans for the industry OEMs. The report also provides a comprehensive SWOT framework analysis on all 5 industry players covered in the report providing useful insights into each player's respective strengths and weaknesses. The report concludes with analysis of key trends, market conditions, potential growth opportunities and outlook for the global aerospace & defense industry.

Relevance & Usefulness: The report will be useful for:

Strategic Planning, Assessment & Decision-Making Processes

Competitor Analysis & Comparative Analysis of covered Industry Players

Identification of & Insights into Potential Growth Opportunities & Avenues

Analysis of Near to Medium Term Strategy Focus and Key Strategies & Plans for all 5 European Aerospace & Defense Companies

Analysis of Emerging Industry, Market & Technology Trends

Medium Term Strategic Outlook, Inputs on Market Evolution & Growth Projections

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

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The report will be essential for Key Decision-Makers & Senior Industry Executives. The report will be especially useful for Program & Procurement Managers, Defense Procurement Departments & Executives, Top Management of Industry Players & Other Companies, Industry OEMs, Suppliers, Vendors, Land Vehicle 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, Researchers and all those associated with the industry or any of the European Aerospace & Defense Companies covered in the report.

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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