

Europe's Top 5 Aerospace & Defense Companies - Annual Strategy Dossier - 2023 - Key Strategies, Plans, SWOT, Trends & Growth Avenues and Market Outlook - Airbus, BAE Systems, Rolls Royce, Leonardo, Safran

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Abstracts

1. Global Defense Spending on a Historic High and Poised for Rapid, Medium-Term Growth:

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 operating in the hibernation mode.

2. Revitalization of the European Defense Industrial Base Underway

The revitalization of the European defense industrial base is in full swing amid increasing threat perceptions from Russia, historic low inventory levels of munitions & missiles across NATO members following years of neglect, rapid shift in strategic defense posture across some nations and focus on preparedness with plans for

replacement & modernization of ageing, cold-war era defense equipment which is likely to provide growth opportunities to European OEMs & their value chains going forward. Leapfrogging of technological capabilities is also very much there in the European agenda following the initiation of a number of new, joint defense programs across the old continent, led by the Franco-German FCAS & MGCS programs, and the Anglo-Japanese 6th generation fighter jet aircraft program. It is in addition to the outright procurement of in-production defense equipment from the other side of the Atlantic to ensure ready availability and Interoperability with NATO forces. For instance, the 5th generation F-35 Lightning II JSF has steadily been expanding its customer base across Europe with Switzerland, Poland, Finland, Czech Republic and now Germany choosing the F-35 platform as a replacement for their ageing, legacy fighter jets while the CH-47F Chinook has been procured by a couple of European nations recently for the combat proven heavy lift capability.

3. Defense Industrial Base Globally Growth-Bound and Geared towards Rapid Ramp-Up of Production Rates while Facing Near-Term Supply Chain & Macroeconomic Challenges:

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. Europe, under NATO, is treading a similar pathway with defense spending by NATO alliance members having grown by 23% over 2018-2022 with focus on getting the defense spending to the 2% of GDP level which has been achieved by a majority of NATO members by 2022 marking a renaissance for the European defense industrial base after decades of slump & neglect.

The defense industrial base across the U.S. & Europe 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.

4. Against this backdrop, the report analyzes & provides:

1. Overall Strategy Focus & Key Strategies & Plans being chalked out by the Europe's Top 5 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. 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 Defense Programs

6. Analysis of Defense Budgets & Overall Budgetary Trend across Key Nations

7. In-Focus, Emerging, Game-Changer Technologies

8. Comprehensive Outlook & Medium-Term Demand Growth Projections for the 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 European/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

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5. Leonardo S.p.A.

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U.S.

Europe

Asia-Pacific

Middle East

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