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Global Aerospace & Defense Industry - 2021-2022 - Strategy Dossier on Top 7 Industry OEMs - Airbus, BAE Systems, Boeing, General Dynamics, Lockheed Martin, Northrop Grumman, Raytheon Technologies

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Abstracts

Global Defense Spending has been on a major upswing led by the resurgence of great power competition amongst leading geopolitical powers and spearheaded by R&D-led technological evolution. The realignment of U.S. defense spending, 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 same remains a key area of focus for the industry given their strategic nature, size, scale as well as scope & long term horizon.

This shift in strategic focus entails fast tracked procurement of systems & hardware to maintain numerical superiority besides rapid development & deployment of next generation capabilities to:

Plug existing & potential capabilities gaps

Retain the traditional, long standing strategic capabilities overmatch against adversaries

Expansion of capabilities through development & incorporation of next generation technologies

The transition of traditional world order towards multi-polarity, marked by the resurgence

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 clearly on the surge & a clear upswing. 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.

The demand side growth stimulus, led by changing geopolitical equations & dynamics, is being conjoined by the technological advancements & evolution on the supply side, led 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 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 an 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. The industry, too, has seen a clear increase in partnerships and M&A activity with OEMs aligning business portfolios with the emerging requirements & budget priorities across markets and looking for scale & competitiveness. Lockheed Martin's recent acquistion of Aerojet Rocketdyne, Raytheon-United Technologies marger and Northrop Grumman's acquisition of Orbital ATK have been clear examples with similar moves seen across the Atlantic in the Europe defense industrial base.

Against this backdrop, the report analyses & provides comprehensive insights into the Global Top 7 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 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 launch of A350F. Airbus also plans to ramp-up production rates for narrow-

body aircrafts over near-term with improving market scenarios across the U.S. and European domestic markets
2. Boeing desperately seeking financial stability following years of turbulence over grounding of its cash cow 737 MAX and continued suspension of 787 deliveries over production quality issues
3. Boeing also actively looking for international exports for CH-47F Chinook & AH-64 Apache Helicopters and F-15EX & F-18 Super Hornet Fighter Jet Programs
4. Lockheed well poised with clear strategic focus on hypersonics and directed energy systems for long term growth while effectively anchored on the F-35 program
5. Ground-Based Strategic Deterrent (GBSD) and B-21 LRSB programs to provide significant propulsion for Long Term growth for Northrop Grumman
6. Contrasting Trajectories for Aerospace & Defense with Defense Spending on Upswing globally while Commercial Aviation jostles with Pandemic Blues
7. Sustainability remains a key focus area for Commercial Aviation while Technological leapfrogging led Overmatch remains the core focus for Defense

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
- Global Defense Budgetary Trend and Defense Budgetary Spending Levels across Key Markets
- 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 Global

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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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