

Global Military Helicopter Market - Top 5 Market Players - Annual Strategy Dossier - 2024 - Airbus, Bell, Boeing, Leonardo, Sikorsky

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Abstracts

1. Strong Demand for Military Helicopters for Fleet Recapitalization & Growth and Capabilities Advancement

The demand for military helicopters has witnessed a strong uptake with the disruption of world order and the drastic, unprecedented deterioration in the security environment globally. The demand has been especially strong for troop transport, heavy airlift, attack and naval helicopters for antisubmarine warfare across most regions globally as nations scramble to replace existing Cold war-era, in-service fleets with modern platforms featuring state-of-art capabilities while also offering a lower total cost of ownership. The development & induction of next generation V-280 Valor tiltrotorcraft, under the U.S. Army's FLRAA program, is likely to shape the likely course of evolution of military helicopters in the U.S. market going forward while the cancellation of the FARA leg is likely to provide a new lease of life to Boeing's AH-64 Apache & Sikorsky's UH-60 Blackhawk platforms. The heavy lift market is likely to witness continued battle between the CH-47F Chinook and the CH-53K King Stallion across markets going forward. The development of NATO's Next Generation Medium Military Helicopter (NGMH) and technology suite, under ENGRT & NGRC initiatives, are likely to be a key growth opportunity for the defense industrial base across multiple EU member-states over medium term. The industry OEMs also increasingly continue to develop and offer mountable weapon system kits for civil helicopter platforms for users looking for basic weapons capabilities and they are proving to be quite popular as well.

2. Global A&D Market in a Major Upswing Phase amid Disruption of Traditional World Order and Geopolitical Tensions & Conflicts

The Global Aerospace & Defense Market is in a major upswing phase owing to the whittling down of traditional, rule-based world order and the return of the era of great power competition; led by China's geopolitical revisionism, backed by military

ascension amid territorial disputes as well as issues with neighbors & military adventurism in Asia; and Russia's military resurgence creating a renewed threat to Europe along with their growing mutual defense cooperation and collaborations with North Korea and Iran, a dangerous reminiscent of the Axis powers of the World War II era. The same has led to a virtual defense renaissance globally and has created a surge in demand for upgrade & modernization of legacy systems, procurement of new defense equipment, replacement & recapitalization of ageing equipment, increased spending outlay towards R&D on next generation technologies and an accelerated production ramp-up of ammunition being undertaken across most key markets globally. Global defense spending, clearly, is on an upward growth trajectory, driven by geopolitical shifts, and is projected to reach \$2.5 trillion by 2025, thereby, providing the defense industrial bases across most key markets significant growth opportunities for the medium term horizon as it is desperately trying to ramp-up production rates over near term amid supply chain constraints to backfill depleting U.S. & NATO allies' stockpiles of munitions, missiles & weapon systems besides fulfilling Ukraine's critical requirements and to meet growing international demand in the era of great power competition. The U.S. Defense Budget continues to be in a growth phase and is pegged at \$833 billion for FY2025 as the focus remains on strategic rivalry with China, supporting allies, namely, Ukraine, Israel and Taiwan, and backing technological advancements as the core pivot amid near-term political uncertainty over the upcoming U.S. Presidential elections.

3. Global Economy Heading towards Slowdown

The global economy, however, is projected to be heading towards a slowdown in 2024 following continued monetary policy tightening posture by central banks globally over the recent years to check inflation. The situation has been further exacerbated by the sustained geopolitical instability marked by the ongoing Russia-Ukraine war, which continues unabated in its third year, and the Israeli military operations in Gaza and dangerous confrontations with Iran & Hezbollah, causing tensions and keeping the entire Middle East region and the world on the edge, thereby, becoming a double whammy for the global economic growth which returns to its range-bound average movement of under 3% annually and is perched dangerously close to a potential recession over near term. However, any further, major potential shocks at this time could send the global economy spiraling down into a recessionary cycle.

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

The report provides comprehensive analysis and insights into the Global Top 5 Military Helicopter Manufacturers with focus on a blend of quantitative & qualitative analysis.

5. 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 Global Aerospace & Defense Industry and Military Helicopter

Market. 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

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Researchers and all those associated with the industry in general

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