

Global Strategy Brief - 2019 - Military Helicopter Manufacturers - Airbus Helicopters, Bell, Boeing, Leonardo Helicopters, Sikorsky, Russian Helicopters

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Abstracts

The current wave of disruptions in geopolitical realities with the meltdown of a traditional, rule based world order, realignment of U.S. priorities with the rise of protectionism and the onset of the trend towards a shift away from unipolarity has led to a spike in defense spending across most key geographic regions and parts of the world over the recent years. Further, the rising geopolitical tensions & uncertainty marked by the rising trade tensions and regional issues like BREXIT have further exacerbated the situation. This resurgence in defense spending is focused on renewing capabilities, capabilities expansion and hardware modernization as well as replacement. Military helicopters have been at the forefront of this renewed phase of defense budgetary resurgence globally as a large proportion of the global in-service military helicopter fleet dates back to the cold war era and has limited capabilities when compared against the rapid evolution of the overall threat spectrum & scenarios.

The realignment of U.S. defense budgetary spending, the largest in the world, to focus on competing with near peer adversaries has accelerated the pace of old hardware replacement & modernization spree coupled with rapid technological advancements by the industry. Several new contracts for military helicopters have been awarded as of late, led by the development contracts for the next generation of rotorcrafts under the strategic Future Vertical Lift (JMR-FVL) program, USAF's UH-1N replacement program and the Navy's upcoming program for the replacement of its TH-57 trainer helicopter fleet. Further, the re-engining of the U.S. Army's AH-64 Apache and UH-60 BlackHawk helicopter fleets, under the Improved Engine Turbine Program (IETP), has taken off in 2019 with the Army selecting the GE's T901 engine. The same trend is being echoed across most other parts of the world with a similar focus.

Further, the platform derivatives strategy of developing common helicopter platforms for potential civil & military applications has been working out well for some leading industry OEMs, led by Airbus Helicopters, Bell & Leonardo, enabling them to offer proven airframes at extremely competitive prices for broader military applications with the end customers preferring proven options to save on development costs & the associated time horizon. The U.S. Army's UH-72 Lakota program based on the Airbus H145, USAF's UH-1N replacement program based on Leonardo's AW139 and the U.S. Navy's upcoming TH-X trainer helicopter program requirements for existence IFRS compliance are prime examples of this. Additionally, arming of traditionally civil or utility military helicopter programs with weapon system kits for light attack mission profiles is broadening growth avenues for the OEMs with Airbus testing its H-Force weapon systems kit and Sikorsky arming the Black Hawks.

Going forward, technology is likely to shape the future of the industry with the upcoming rotary UAS programs and manned-unmanned teaming for military rotorcraft applications followed by the next generational & game changing capabilities being developed for the FVL program, in form of Bell's V-280 Valor and Sikorsky's SB1 Defiant prototypes for specific requirements sets, are likely to open the next chapter in the relatively short but illustrious history of military helicopters by the middle to later part of next decade.

Against this rapidly evolving industry and market backdrop, this Strategy Brief report provides a comprehensive & holistic analysis of the overarching strategy focus across industry OEMs and insights into the key strategies & plans being conceptualized, developed & pursued by these OEMs for the near to medium term horizon to navigate their way through the existing environmental challenges & uncertainty while looking to drive growth for themselves in a relatively favorable phase for the industry.

Relevance & Usefulness:

The report provides insights & inputs to be incorporated into the broader strategic planning & decision making processes and will be essential from a competitive analysis standpoint as well.

The report will be useful for:

Strategic Planning & Decision-Making process

Analysis of Near to Medium Term Strategy Focus and Key Strategies & Plans for OEMs

Identification of & Insights into Potential Growth Opportunities & Avenues

Market Evolution & Demand Growth Projections over Medium Term

Analysis of Key Market, Industry & Technology Trends and Developments likely to Shape Future

Strategic Market Outlook, Evolution & Demand Growth Projections over Medium Term

For Whom:

The report would be quintessential for those having strategic interest & stakes in the Global Military Helicopter market. 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/sector. 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.

Contents

SECTION - 1

Strategy Focus & Priorities - For all 6 Military Helicopter OEMs

Airbus Helicopters

Bell

Boeing

Leonardo Helicopters

Sikorsky Aircraft Corporation

Russian Helicopters

SECTION - 2

Key Strategies & Plans - Airbus, Bell, Boeing, Leonardo, Sikorsky, Russian Helicopters

Product Portfolio Strategies & Plans

Service Level Strategies & Plans

Technological and R&D Strategies & Plans

Market Specific Strategies & Plans - Traditional & Emerging Markets

Corporate Strategies & Plans

Sales, Marketing & Branding Strategies and Plans

Manufacturing/Production Strategies & Plans

Business Growth Strategies & Plans - Organic & Inorganic

Financial Strategies & Plans

Acquisitions, Strategic Alliances & JVs

Other Strategies & Strategic Initiatives

SECTION – 3

Business Outlook for 2019 – Analysis - For Each Industry OEM

Airbus Helicopters

Bell

Boeing

Leonardo Helicopters

Sikorsky Aircraft Corporation

Russian Helicopters

SECTION – 4

Global Military Helicopter Market - Force Field Analysis - Analysis of Driving & Restraining Forces and their Overall Dynamics

Driving Forces

Restraining Forces

SECTION – 5

Key Trends

Industry Trends

Market Trends

Technology Trends

SECTION – 6

Key Issues, Challenges & Risk Factors

SECTION – 7

Market Outlook – Global Military Helicopter Market through 2025

7.1 Strategic Market Outlook

7.2 Global Military Helicopter Deliveries Forecast through 2025 – Delivery Units

7.3 Global Military Helicopter Deliveries Forecast through 2025 – Value of Deliveries - in \$Billions

7.4 Projected Production Share for OEMs through 2025 – In Units & Value Terms

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