

# Global Top 7 Aerospace & Defense Companies - Annual Strategy Dossier - 2023 - Key Strategies, Plans, SWOT, Trends & Growth Avenues and Market Outlook - Lockheed Martin, Northrop Grumman, Airbus, Boeing, BAE Systems, General Dynamics, Raytheon

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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 hibernation.

China's rapid military build-up & emergence as the regional belligerent power in the Asia-Pacific has other nations in the region spooked up setting off one of the biggest arms race in the APAC marked by Japan's redefined strategic posture for defense, India's rapid build-up of military capabilities to counter China's bellicosity and Australia's virtual defense renaissance besides the emergence of regional security

cooperation frameworks, alliances & pacts, like QUAD & AUKUS, aimed at containing China. The U.S.-China faceoff is further escalating over China's ascent as a revisionist state with a rapid military build-up and steadily growing global economic & diplomatic influence with the U.S. officially terming China as the strongest & most serious, long-term rival globally. The traditional West vs. East fault line & rivalry, thus, is visible clearly once again and has been driving defense spending & military rearmament globally following the emergence of an unprecedented & rapidly evolving Russia-China cooperative axis, thereby, turning out to be a real windfall for the global defense industrial base.

## 2. Defense Industrial Base Globally Growth-Bound and Geared towards Rapid Ramp-Up of Production Rates:

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. A number of new, large-scale defense contracts of strategic nature, scale, scope & long term horizon have already been initiated or awarded over the recent years, including, the B-21 LRSB, JLTV, FVL, NGAD and the Virginia & Columbia class submarine programs while many more are in the offing, including, the U.S. Army's OMFV program to replace Bradleys and the development of Hypersonic weapons for the USAF & the USN. 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.

The defense industrial base across the U.S. 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.

### 3. Supply Side-Led Market Scenario:

The near-term outlook for the Aerospace & Defense industry contrastingly is going to be dominated by the supply side for sure and the situation could be termed as difficult, complex & challenging marked by supply chain disruptions, bottlenecks, constraints & labor shortages in an uncertain global macroeconomic environment marked by high inflation levels & monetary policy tightening underway across most markets by central banks to contain it. The situation has been gradually ameliorating but is likely to hinder plans being chalked out by the industry OEMs to ramp up production rates to the levels being anticipated over near term. The emerging geopolitical challenges, conflicts & tensions and ongoing power plays are likely to provide significant growth opportunities to the global aerospace & defense industry over near to medium term with defense budgets across most nations headed northwards.

Against this backdrop, the report analyzes & provides:

1. Overall Strategy Focus & Key Strategies & Plans being chalked out by the World's Top 7 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 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 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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