

Leonardo S.p.A. - Strategy Playbook - 2025 - Strategy Focus, Key Strategies & Plans, SWOT, Trends & Growth Opportunities, Market Outlook

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Abstracts

The 2025 edition of this Strategy Playbook report analyses the overall Strategy Focus and provides insights into the overall Strategy Focus and decrypts the key Strategies & Plans being pursued by Leonardo S.p.A. for the near to medium term horizon amid a complex, difficult & challenging global macroeconomic environment marked by rising geopolitical tensions and looming threat of renewed trade wars under Trump Administration 2.0. The Global Aerospace & Defense Market is in a major upswing phase marked by rising defense spending globally as the dark shadow of geopolitical conflicts returns to haunt mankind as the traditional, rule-based world order faces a serious challenge from the revisionist powers and traditional, below the surface geopolitical fault lines experience renewed tectonic friction leading to breakout of armed conflicts across the Middle East and Europe. The resurgence of Russia as Europe's regional hector and China's military ascendancy as the regional bully in the Pacific along with the Gordian knot of a nuclear-armed North Korea and almost-nuclear Iran; collectively pose a serious challenge to the U.S.-led traditional world order while also directly threatening nations located across Europe and the APAC regions respectively.

Further, the return of Trump to White House and looming uncertainty over policy direction and America's continued military support under him for NATO and other regional allies located across Europe and the Asia-Pacific regions is likely to drive a further surge in defense spending globally, which has already touched record levels, going forward and has been leading to a surge in order intakes and backlog across industry OEMs. The same has witnessed massive efforts being undertaken to revitalize defense industrial bases across most regions globally to ramp-up production rates for core systems, like artillery, armor and missiles, and for rapid upgrade, modernization and recapitalization of in-service Cold War-era legacy defense systems, with the

initiation of FCAS, GCAP and MGCS programs, being prime examples. China's mass deployment of almost 800 5th generation J-20 jets so far and the active development of J-36 & J-XX/J-50 6th generation fighter jet platforms and the H-20 long-range bomber present the most formidable challenge to the traditional & virtually absolute American aerial dominance & overmatch in the 21st century. American response, in form of the NGAD program featuring adaptive cycle engines, seemingly, is just around the corner.

The taming of inflation, monetary policy easing and the relative easing of supply chain woes globally have come as welcome news for the world economy in 2025 while continuing military conflicts across Ukraine & the Middle East, looming specter of upcoming trade wars under Trump Administration and rising debt levels along with the need to sustain substantial defense spending levels amid slowing economic growth pose a serious challenge to it over near term. Overall, the world economic growth is projected to remain flat for 2025 at level which is almost 400 bps below the average GDP growth rate for the average pre-pandemic growth rate registered through the 2010s decade.

Against this backdrop, the report provides a comprehensive analysis into Leonardo's overall strategy playbook featuring detailed insights into the overarching, near-to-medium term strategy focus and key strategies & plans being crafted by the company to adroitly navigate the emerging market landscape and effectively capitalize upon upcoming growth opportunities, in form, of the surging global defense spending and demand for the replacement & modernization of Cold War-era legacy defense systems with next-generation systems and technologies. The tri-nation GCAP program being pursued jointly by Great Britain, Italy and Japan holds strategic significance for these nations and Leonardo, which is representing Italy as the defense prime spearheading it, as the truly 6th generation fighter jet program scheduled to enter service by 2035. Leonardo is also poised to become a key player in the European market for armor and military combat vehicles going forward by foraying into the segment with the establishment of a recent JV with Rheinmetall to jointly produce main battle tanks for the Italian Army based on the latter's Leopard 2A7+ MBT platform and the planned procurement of over 1,000+ KF-41 Lynx IFVs for the Italian Army's AICS program.

The report provides a comprehensive analysis on the company starting with a detailed business and financial snapshot, incorporating charts, tables and comprehensive analysis based on latest financial statements. An insightful & comprehensive SWOT framework analysis is also included; providing a comprehensive scan, assessment & analysis of the prevailing internal as well as external business environment of the

company. The framework outlines the company's core, inherent strengths & weaknesses as part of the internal environment assessment and outlines potential growth opportunities as well as threats as part of the external environment assessment.

The report also incorporates analysis & review of key market, technology & industry trends along with issues & challenges which are likely to impact and shape the industry's future over near to medium term. The report also identifies key driving & restraining forces for the industry & assesses their potential degree of impact through a force field analysis. The report concludes by providing a comprehensive, medium-term market outlook & demand growth projections for the Global Aerospace & Defense Market encompassing all key geographic markets as well as regions over medium term.

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 company and/or the Global Aerospace & Defense Market. The report will be especially useful for:-

Key Decision-Makers

Defense Departments, Program Managers & Contracting Executives

Top Management of Industry Players, OEMs & Other Companies across the Industry Value Chain

Suppliers, Vendors, Technology & MRO 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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