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U.S. Aerospace & Defense Industry - 2021-2022 - Strategy Dossier on Top 5 Industry OEMs - 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 among leading geopolitical powers and spearheaded by R&D-led technological evolution. The realignment of U.S. defense spending, the largest in the world, 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 & contention 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

Optimize total cost of ownership over long term

The transition of the 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 on the surge. 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.

Defense spending in the U.S. is being beefed up steadily over the years to provide for recapitalization of ageing equipment as well as development of next generation technologies. The U.S. defense industrial base is gearing up for the demand renaissance with several big ticket defense contracts already awarded and at different stages of development & service entry, most noticeably, JLTV, B-21 LRSB, M1A2 Abrams MBT modernization, JMR-FVL, T-X Trainer, existing helicopters re-engining with the ATEP and the upcoming B-52 Re-Engining program, rapid development of hypersonics capability and initiation of the OMFV program for the replacement of the venerable M2 Bradley IFV fleet.

The demand side growth stimulus, being led by changing geopolitical equations & dynamics, is being conjoined by the technological advancements & evolution on the supply side, spearheaded 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 a slight 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.

Against this backdrop, the report analyses & provides comprehensive insights into the U.S. Top 5 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.

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

U.S. Defense Budgetary Trend and Defense Budgetary Spending Levels across Key Defense Markets Globally

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 U.S./Global 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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