

# U.S. Aerospace & Defense Market - Top 5 A&D Primes - Annual Strategy Dossier - 2024 - Boeing, Lockheed Martin, Northrop Grumman, General Dynamics, RTX

<https://marketpublishers.com/r/U4DBACF7F35FEN.html>

Date: April 2024

Pages: 200

Price: US\$ 1,495.00 (Single User License)

ID: U4DBACF7F35FEN

## Abstracts

1. Defense Spending across the U.S. and most Key Global Markets in a Major Upswing Phase amid ongoing Great Power Competition, Geopolitical Tensions & Political Conflicts across Regions

The Global Aerospace & Defense Market is in a major upswing phase owing to the whittling down of traditional, rule-based world order; 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 with a renewed threat to Europe as the geopolitical dynamic clearly shifts towards multi-polarity. The same has led to a virtual defense renaissance globally and has created a surge in demand for procurement of new defense equipment, replacement of legacy systems, 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 having reached the record level of \$2.4 trillion for 2023, driven by geopolitical shifts, and is projected to reach \$2.5 trillion in 2024, 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, the largest in the world, continues to be in a marked growth phase and is pegged at \$849.8 billion for FY2024, after registering a modest 2.3% YoY growth for 2023, as the

focus remains on strategic rivalry with China and further capabilities development for sustained overmatch, supporting Ukraine, Israel, Taiwan & other global allies and technological advancement as the core pivot amid the near-term political uncertainty over the upcoming U.S. Presidential elections and the likely degree of subsequent U.S military support as well as posture towards the NATO Allies.

## 2. Doctrinal & Tactical Emphasis on a Mix of Conventional & Disruptive Capabilities

The ongoing Russia-Ukraine war, which has just entered its third year in 2024, has already led to a shortfall in the availability of ammunition and has led to a renaissance & revitalization of defense production capabilities as well as capacity globally. The war has brought back the doctrinal & tactical emphasis on and has highlighted the critical role of conventional artillery, armor, air defenses, missile systems in the overall force structure. Further, the improvised & innovative usage of UAS as well as loitering munitions has bolstered efforts globally towards bolstering & revitalization of capabilities across these growth-bound domains over near to medium term. Israel's ongoing military operation against Hamas in Gaza has further exacerbated geopolitical tensions, created unrest and has disrupted the existing dynamics and equations as the entire Middle East region sits on the edge of the precipice over the Palestine issue. Further, the rapidly rising profile as well as sophisticated capabilities of non-state actors poses a serious threat to global security & world order as they seriously challenge the ability of states to counter them in a cost-effective manner.

## 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 high inflation levels. The situation has been further compounded by the sustained geopolitical instability, led by the ongoing Russia-Ukraine war and the Israeli military operations in Gaza, which collectively threaten to cause supply shocks & raise prices of food owing to scarcity, thereby, becoming a double whammy for the global economic growth, which has already regressed to its range-bound, typical, average movement of under 3% annually. However, any further, major potential shock at this time could send the global economy spiraling down into a recessionary cycle without having a major impact on global defense spending, as was demonstrated effectively during the COVID-19 pandemic.

The report analyzes & provides:

Against this backdrop, the report provides comprehensive insights & strategic analysis into the overarching Strategy Focus as well as Key Strategies & Plans for the Top 5 U.S. Aerospace & Defense Companies. The report provides a detailed analysis on key industry OEMs, including, business portfolios & overarching focus across key market segments, financial analysis & SWOT framework analysis. The report also provides the likely market scenario for defense spending globally over near to medium term with focus on key existing & upcoming defense programs, analysis of key market & technological trends, issues & challenges, market developments & potential growth opportunities which could be leveraged by the industry value chain. The report concludes by analyzing market evolution and projecting demand outlook for the Global Aerospace & Defense Market for the near to medium term horizon.

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 U.S./Global Aerospace & Defense Industry. The report will be especially useful for:-

Key Decision-Makers across the U.S. and Global Aerospace & Defense Industry

Defense Procurement Executives & Defense Departments

Program Offices & 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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