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World's Top 10 Aerospace & Defense Companies - Annual Strategy Dossier - 2019 - Airbus , Boeing, BAE Systems, General Dynamics, GE Aviation, Lockheed Martin, Northrop Grumman, Raytheon, Safran, United Technologies

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Abstracts

Global Defense Spending has been on a steady upswing since the past couple of years with the same reaching the $1.8 trillion mark for 2018, the highest level since the post cold war low of 1998, while registering a 2.6% year on year growth driven by the radical transformation of geopolitical dynamics and equations with the dismantling of traditional rule based world order and the transition away from the typical unipolar world, which had prevailed since the end of Cold war. The same has been further exacerbated by the Trump led U.S. administration’s squandering of the traditional global leadership role under the “America First” policy which has led to realignment of relationships with the key NATO & other allies with the mandate to increase defense spending to the 2% level of GDP.

The Global Defense Spending is led by the U.S. & China which collectively accounted for over 50% of the total for 2018, with the U.S. registering its first major increase in defense spending since 2010. The Top 5 defense spending nations accounted for 60% of the total global defense spending in 2018. The continued development of military capabilities by China & the resurgence of Russia as a key regional power over the years have already induced a shift in the overall U.S. strategy towards competition with near peer adversaries as against counter-terrorism operations, which had been the focus earlier. This shift in strategic focus entails fast tracked procurement of systems & hardware to maintain numerical superiority, rapid development & deployment of next generation capabilities to plug existing & potential capabilities gaps and to retain the traditional, long standing strategic capabilities overmatch against adversaries along with

continued R&D pursuits to maintain technological edge.

The defense industrial base across the U.S., Europe & most parts of the world has been on a renaissance of sorts over the recent years given the rapid transformation & evolution of geo-political dynamics & ongoing conflicts across some parts of the world. The modernization & upgrade of existing systems & hardware and their replacement with proven technologies and current, off the shelf solutions is providing significant growth opportunities to the U.S. defense industrial base as showcased by the initiation of a number of new, large ticket defense procurement programs over the recent years, which include, JLTV for replacement of ageing & obsolete HMMWVs, Capabilities upgrade for the M1 Abrams MBTs & M2 Bradley, New contract Awards under AMPV & ACV 1.1 programs, award of development contracts for the next generation of rotorcrafts under the strategic Future Vertical Lift (JMR-FVL) program, the next generation strategic bomber B-21 Raider under the LRS-B program, USAF’s UH-1N replacement program and the Navy’s upcoming program for the replacement of its TH-57 trainer helicopter fleet & the replacement of its in-service destroyer & submarine fleets. The same trend is being echoed across most other parts of the world with a similar focus as highlighted by the multi-billion dollar Australian Land 400 program spread across multiple phases and initiation of multiple modernization programs across Europe, most noticeably, the joint Franco-German Future Combat Air System (FCAS) & Main Ground Combat System (MGCS) programs and the comprehensive modernization of the British Land, Air & Naval Forces under multiple new programs. Commercial aviation, one of the largest industry segments, too, continues with its one of the longest super-cycles with record order backlogs across industry OEMs bolstering top line growth throughout the industry value chain.

Thus, with acknowledgement of strong external threat perceptions, there is political consensus on fast tracked modernization, upgrade & replacements, which have been further corroborated by technological developments by the industry which are promising next generation capabilities at a workable & optimized TCO proposition. The global defense industrial base, thus, is readily gearing up with a spurt in activity and is looking forward to a long & much anticipated activity boom with most OEMs reinvigorating their industrial bases, in line with the age of disruptive technologies, led by digitalization, additive manufacturing, unmanned & optionally manned operating capabilities & artificial intelligence, for making the most of this current phase of demand upswing.

Against this dynamic & rapidly evolving market & industry landscape, the report provides comprehensive analysis of the overarching strategy focus and insights into the Strategies & Plans being conceptualized, developed & pursued by the World’s Top 10

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Aerospace & Defense Companies for the near to medium term horizon as the industry braces up for a significant growth phase ahead. The report is unique with reference to its core focus on deep qualitative analysis of strategies & plans for the industry OEMs. The report also provides a comprehensive SWOT framework analysis on the World's Top 10 Aerospace & Defense primes covered in the report providing useful insights into each player's respective strengths and weaknesses. The report concludes with analysis of key trends, market conditions, potential growth opportunities and outlook for the global aerospace & defense industry.

Relevance & Usefulness: The report will be useful for:-

Strategic Planning, Assessment & Decision-Making Processes

Competitor Analysis & Comparative Analysis of covered Industry Players

Identification of & Insights into Potential Growth Opportunities & Avenues

Analysis of Near to Medium Term Strategy Focus and Key Strategies & Plans for the Global Top 10 Aerospace & Defense Primes

Analysis of Emerging Industry, Market & Technology Trends

Medium Term Strategic Outlook, Inputs on Market Evolution & Growth Projections

For Whom: Business Leaders & Key Decision-Makers across Industry Value Chain

The report will be essential for Key Decision-Makers & Senior Industry Executives. The report will be especially useful for Program, Project & Procurement Managers, Defense Procurement Departments & Executives, Top Management of Industry Players & Other Companies, Industry OEMs, Suppliers, Vendors, MRO Services Providers, Technology & Other Services Solutions Providers 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, Researchers and all those associated with the industry or any of the Global A&D companies covered in the report.

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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