

The Military Helicopter Market 2012-2022

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Abstracts

Military helicopters play a vital role for armed forces throughout the world, aiding ground and naval troops within varying combat and humanitarian scenarios. The extensive range of helicopters produced worldwide reflects their diverse use within military operations, and as such, the military helicopter market is one characterised by dynamism and response to emerging operational challenges. Visiongain has determined that that value of the military helicopter market will reach \$19.4bn in 2012.

Given the importance of helicopters to militaries, a robust market for military helicopters is expected over the next decade, as multiple nations seek to upgrade their air capabilities. The US predictably spends the most on military helicopters as these aircraft are in great demand in its military operations. However, the end of combat operations in Iraq in 2011 and the planned withdrawal from Afghanistan in 2014 could signal a dampening in demand. In addition, there is currently strong pressure on the defence budgets of many countries, particularly those in Europe and North America. In these countries, helicopters are still expected to receive priority funding, yet long term military spending can often be delayed or amended in order to suit short term financial requirements.

Away from Western military helicopter markets, several countries in Asia and the Middle East are embarking on significant military helicopter acquisition and upgrade programmes that will boost overall global demand for rotorcraft. Nations such as South Korea, India, China, Turkey and Saudi Arabia have major plans to develop their helicopter fleets, and spending within these national helicopter markets is expected to reflect the emerging growth and military power of the Asian continent.

Unique Selling Points:

Comprehensive analysis of the prospects for the military helicopter market from

2012-2022.

235 tables, charts and graphs that quantify, analyse and forecast the changing dynamics of the military helicopter market between 2012-2022.

Forecasts and analysis for the global military helicopter market between 2012-2022 in US\$ and units.

Global forecasts for the military helicopter market from 2012-2022 in terms of new helicopters and upgrades.

Global forecasts and analysis for 7 military helicopter submarkets from 2012-2022 in US\$ and units.

Forecasts and analysis for 20 leading national military helicopter markets, as well as rest of the world figures and projections for the period 2012-2022 in US\$ and units

Forecasts and analysis for 7 military helicopter submarkets within each of the leading 20 national markets from 2012-2022 in US\$ and units.

Analysis of the forces that influence and characterise the military helicopter market.

Profiles of 12 leading companies operating within the military helicopter market.

Analysis and forecasting informed by expert consultation with industry leaders. You will be able to read a full interview transcript from a leading company involved within the military helicopter market.

Methodology

This report has been compiled by combining information obtained from a very wide and rich mixture of primary and secondary research sources, producing a broad industry overview. Visiongain sought opinions from leading figures in the military helicopter market to underpin the analysis of market drivers and restraints. The study draws on a diverse range of official corporate and governmental announcements, media reports, policy documents, industry statements and expert opinion as a basis for discussing and

predicting developments in the military helicopter market between 2012 and 2022.

Visiongain considers that this methodology results in an accurate, objective mixture of analyses and forecasts.

Why you should buy this report:

You will gain understanding and analysis, as well as receive sales forecasts, for the military helicopter market in terms of value (US\$) and units.

You will be able to study 235 tables, charts and graphs quantifying, analysing and forecasting the military helicopter market in detail over the period 2012-2022.

You will receive global forecasts for new acquisitions and upgrades in the military helicopter market in terms of value (US\$) and units.

You will receive global forecasts for 7 key military helicopter submarkets from 2012-2022 (US\$ and units).

Attack Helicopters

Reconnaissance Helicopters

Heavy-Lift Cargo Helicopters

Medium Utility Helicopters

Light Utility Helicopters

Maritime Helicopters

Search and Rescue Helicopters

You will receive forecasts for 20 leading military helicopter national markets from 2012-2022 (US\$ and units).

Algeria

Australia

Brazil

Canada

China

France

Germany

India

Iraq

Italy

Japan

Russia

Saudi Arabia

South Korea

Spain

Taiwan

Turkey

United Arab Emirates

United Kingdom

United States

You will receive forecasts for 7 key military helicopter submarkets for each of the

20 leading military helicopter national markets from 2012-2022 (US\$ and units).
Attack Helicopters

Reconnaissance Helicopters

Heavy-Lift Cargo Helicopters

Medium Utility Helicopters

Light Utility Helicopters

Maritime Helicopters

Search and Rescue Helicopters

You will be able to read an exclusive expert interview with AVX Aircraft - a US company developing designs for future helicopters.

You will gain knowledge of who the leading players are within the military helicopter marketplace with profiles of 12 leading military helicopter companies.

You will receive a SWOT analysis for strengths, weaknesses, opportunities and threats to the military helicopter market from 2012 onwards.

What is the structure of the report?

Chapter 1 is the executive summary

Chapter 2 discusses general trends in the global military helicopter market, including how the submarkets were defined for this report.

Chapter 3 analyses the global military helicopter market, providing forecasts and analytical discussions for the following:

Global military helicopter market in terms of projected sales (US\$), along with growth rates

Submarkets in terms of projected sales (value (US\$) and units):

Attack Helicopters

Reconnaissance Helicopters

Heavy Cargo Helicopters

Medium Utility Helicopters

Light Utility Helicopters

Maritime Helicopters

Search and Rescue Helicopters

Submarkets in terms of projected sales (value [US\$] and units):

New Acquisitions

Upgrades

Chapter 4 covers 20 leading national markets: the United States, Canada and Brazil in the Americas; the United Kingdom, France, Germany, Italy, Spain, Turkey and Russia in Europe; Saudi Arabia, the United Arab Emirates, Iraq and Algeria in the Middle East and Africa; and China, India, Japan, South Korea, Taiwan and Australia in Asia-Pacific. This chapter surveys key programmes involving military helicopter systems and provides individual country forecasts for sales in terms of value (US\$) and number of units.

At the national level, the 7 submarkets are forecast from 2012-2022(value (US\$) and units):

Attack Helicopters

Reconnaissance Helicopters

Heavy Cargo Helicopters

Medium Utility Helicopters

Light Utility Helicopters

Maritime Helicopters

Search and Rescue Helicopters

Chapter 5 lists the main strengths, weaknesses, opportunities and threats (SWOT) for the military helicopter market.

Chapter 6 provides an interview with an expert within the military helicopter sector:

Mr Troy Gaffey, President and Chief Engineer of AVX Aircraft, a US company that has proposed design upgrades for the US Army's scout helicopters and has been contracted by the US Army as among the companies asked to do early studies on the Joint Multi Role (JMR) family of future helicopters.

Chapter 7 provides profiles of 12 key companies involved in the military helicopter sector.

Chapter 8 highlights conclusions from Visiongain's research and analyses.

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COMPANIES LISTED

AgustaWestland

Alenia
ARINC Engineering Services
ATE Aerospace
Australian Aerospace Ltd
AVIC
AVX Aircraft
BAE Systems
Bell Helicopter
Bell Helicopter Textron
Bell-Boeing (partnership for V-22)
Bendix
Boeing Company
Boeing Defense, Space & Security (BDS)
Changhe Aircraft Industries Corporation (CAIC)
CHC Helicopter
China Helicopter Research and Development Institute (CHRDI)
Denel
Dillon
EADS CASA
EADS North America
Eurocopter
Eurocopter Deutschland
Eurocopter Espana
Eurocopter France
European Aeronautics Defence & Space Company (EADS)
Finmeccanica
FLIR Systems
Fuji Heavy Industries
Galileo Avionica
General Dynamics
General Electric (GE)
GKN Aerospace
GRPZ
Harbin Aircraft Manufacturing Company (HAMC)
Helibras
Hindustan Aeronautics Ltd (HAL)
Honeywell International Inc
Indra
Isdefe

ITT Corporation
Kaman Corporation
Kamov Design Bureau
Kawasaki Heavy Industries Ltd
Kazan Helicopter Plant
Klimov JSC
Korea Aerospace Industries Ltd (KAI)
Korean Air
Korean Air Aerospace
L-3 Communications
Lectern Aviation Supplies Co.
Light Helicopter Turbine Engine Company (LHTEC)
Litton
Lockheed Martin
Lockheed Martin Missiles and Fire Control
MD Helicopters
Mil Moscow Helicopter Plant (Mil Helicopter)
Mitsubishi Group
Mitsubishi Heavy Industries Ltd
Nexter
NHIndustries (NHI)
Phazotron
PZL Mielec
PZL Swidnik
Raytheon
Roketsan
Rolls-Royce
Rosoboronexport
Rostvertol Plc
Royal Bank of Scotland
Russian Helicopters
Sagem
Sichuan Lantian Helicopter Company
Sikorsky Aerospace Services
Sikorsky Aircraft Corporation
Soteria Consortium
Stork Fokker Aerospace
Telephonics
Textron Inc

Thales
Thales UK
Thales Underwater Systems
Turbomeca
Turkish Aerospace Industries (TAI)
TUSAS Engine Industries Inc (TEI)
UIC Oboronprom
United Technologies Corporation (UTC)
Viking Air

GOVERNMENT AGENCIES AND @OTHER ORGANISATIONS MENTIONED IN THIS REPORT

Algerian Air Force
Algerian Ministry of Defence
Algerian National Navy
ARMAEREO
Australian Army Aviation
Australian Army Aviation 1st Aviation Regiment
Australian Defence Force (ADF)
Australian Joint Helicopter Training School
Brazilian Air Force
Brazilian Army
Brazilian Navy
British Army
British Army Air Corps
French Air Force
French Army
French Army Light Aviation (ALAT)
French Government Operational Support Agency (SIAe)
French Navy
German Air Force
German Army
German Navy
Indian Air Force (IAF)
Indian Army
Indian Coast Guard
Indian Ministry of Defence
Indian Navy (IN)

Iraqi Air Force (IqAF)
Iraqi Ministry of Defense
Italian Air Force (Aeronautica Militare)
Italian Army
Italian Army Aviation
Italian Army Aviation 1st Regiment AVES Antares
Italian Navy
Japan Air Self-Defence Force (JASDF)
Japan Ground Self-Defence Force (JGSDF)
Japan Maritime Self-Defence Force (JMSDF)
Japanese Ministry of Defence
Korea Aerospace Research Institute (KARI)
Kurdistan Workers Party (PKK)
NATO Helicopter Management Agency (NAHEMA)
North Atlantic Treaty Organisation (NATO)
People's Liberation Army (PLA)
People's Liberation Army Navy (PLAN)
Republic of China Air Force
Republic of Korea Air Force (ROKAF)
Republic of Korea Army (ROKA)
Republic of Korea Marine Corps (ROKMC)
Republic of Korea Navy (ROKN)
Royal Air Force (RAF) (UK)
Royal Australian Navy (RAN)
Royal Canadian Air Force (RCAF)
Royal Navy
Royal Navy Fleet Air Arm
Royal Saudi Land Forces (RSLF)
Royal Saudi Land Forces (RSLF) Aviation Command
Russian Air Force
Russian Army Aviation
Russian Ministry of Defence
Saudi Arabian National Guard (SANG)
Saudi Arabian Royal Guard (SARG)
South Korean Agency for Defense Development (ADD)
South Korean Defense Acquisition Program Administration (DAPA)
Spanish Air Force (Ejercito del Aire [EA])
Spanish Army (Ejercito de Tierra [ET])
Spanish Army Airmobile Force (Fuerzas Aeromoviles del Ejercito de Tierra [FAMET])

Spanish Ministry of Defense
Spanish Ministry of Defense Armament and Material General Directorate
Spanish Navy
Turkish Army
Turkish Navy (TDK)
UK Ministry of Defence (MoD)
US Air Force (USAF)
US Air Force Air Combat Command
US Air Force Air Mobility Command
US Air Force Space Command
US Air Force Special Operations Command (AFSOC)
US Air Force Special Operations Command (AFSOC) 8th Special Operations Squadron
US Army
US Army 160th Special Operations Aviation Regiment (SOAR)
US Army Aviation Applied Technology Directorate (AATD)
US Army National Guard
US Army Research, Development and Engineering Command
US Congress
US Defense Security Cooperation Agency (DSCA)
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