

The Market for Military Transport Aircraft

Product Code #F616

A Special Focused Market Segment Analysis by:



Analysis 2 The Market for Military Transport Aircraft 2010-2019

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PROGRAMS

The following reports are included in this section: (**Note:** a single report may cover several programs.)

Airbus A400M
Airbus Military C-212 Series
Alenia C-27J
Antonov An-70
Boeing C-17
CASA/IPTN CN-235/C-295
Embraer KC-390
Kawasaki C-X/P-1
Lockheed C-5 Galaxy
Lockheed Martin C-130 Hercules
PZL Mielec M28 Skytruck
Xi'an MA60/MA600 Series

Introduction

Forecast International defines the market for military transports to include aircraft that perform one or more military air transportation missions such as personnel transport, long-range strategic airlift, and short-range tactical transport, as well as short-haul utility runs. With the exception of a few models included in the light/utility transport segment, this analysis covers only aircraft that are designed to serve as military transports and have excluded aircraft designed for the civilian market such as commercial airliners, regional jets, or business jets, all of which typically are only lightly modified for military service before delivery to a military customer.

For example, **Boeing's C-17 Globemaster III** was developed from McDonnell Douglas' high-winged Y-15 entrant in the U.S. Air Force's 1970s-era Advanced Medium STOL Transport (AMST) competition and has no civilian analogue. It is a true military transport. But there are other aircraft used to transport military freight and passengers that are not true military aircraft. The Boeing C-40 Clipper, for example, is based on the Boeing 737-700. It is produced on the same production line as other 737s by Boeing Commercial Airplanes in Renton, Washington. The aircraft is modified slightly before entering military service, but completion of the C-40 at the company's Integrated Defense Systems facility in Wichita, Kansas, primarily involves installation of an FAA-certificated kit to provide a "combi" configuration capable of rapidly switching between passenger service and cargo hauling. The C-40 is little more than a civilian airliner in U.S. military livery, and for that reason we exclude it from our analysis of the market for military transports. Likewise, we have excluded any transports reconfigured for various special-purpose military missions that do not involve moving troops or cargo, and aerial refueling aircraft converted from civil airliners that also have a supplementary cargo-carrying capability.

The aircraft covered in this analysis have been divided into three classes based solely on gross takeoff weight (GTOW). Heavy transports include any aircraft above 80,000 pounds GTOW used primarily for military transport purposes. Medium transports encompass the

same basic mission description as the heavy transports but operate in a range between 20,000 and 80,000 pounds GTOW. Light transports are defined as those aircraft weighing less than 20,000 pounds GTOW.

Military transport aircraft tend to be built to fill demanding performance requirements that converted civilian airliners cannot meet. They typically have ramps in the rear of the aircraft to facilitate the loading of vehicles and oversized cargo. They are optimized for shorter takeoff and landing runs than civil airliners of equivalent weight, and provided with a surfeit of power to ensure that they can take off at high-density altitudes while heavily loaded. Unlike airliners, they are also specially designed to be operated in combat zones in which ground fire and surface-to-air missiles represent a threat. However, the design differences between military transport aircraft and their civilian counterparts are less significant for light transports than for aircraft on the heavier side. We have therefore included military production of several primarily civilian models in the light transport class in this analysis.

This analysis covers market trends and the competitive environment in the decade ahead based on a review of the market for the following aircraft:

Heavy Transports

Airbus A400M
Antonov An-70
Boeing C-17A
Embraer KC-390
Kawasaki C-X
Lockheed Martin C-130J Hercules

Medium Transports

Alenia Aeronautica C-27J
EADS CASA C-295
EADS CASA/IPTN CN-235M
Xi'an MA60/MA600

Light/Utility Transports

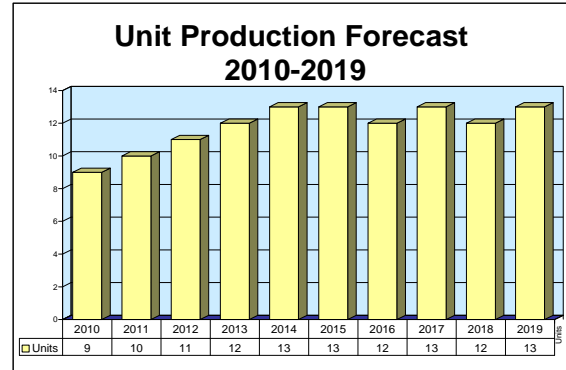
EADS CASA C-212
Harbin Y-12
PT. Dirgantara Indonesia NC-212-200
PZL Mielec M28 Skytruck

* * *

Alenia C-27J

Outlook

- U.S. Air Force is major customer after Pentagon shifted control of Joint Cargo Aircraft program from U.S. Army
- Air Force is considering expanding requirement, but production forecast currently includes only 38 aircraft will be acquired
- Competes primarily with EADS CASA C-295 in market for Western twin-engine tactical transports



Orientation

Description. Pressurized twin-turboprop tactical military transport derived from Alenia G.222.

Sponsor. Sponsored by Alenia's Aeronautica Group and Lockheed Martin as the Lockheed Martin Alenia Tactical Transport Systems (LMATTS) joint venture.

Status. C-27J prototype, a converted G.222, flew in August 1999. First deliveries in 2005.

Total Produced. Alenia produced 33 C-27Js through 2009, excluding two modified G.222s converted into C-27J prototypes.

Application. Short/medium-range, all-weather tactical military transportation of cargo and personnel. Also offered in civil flight inspection, firefighting, electronic reconnaissance, maritime patrol, and VIP transport configurations.

Price Range. C-27J average unit cost \$30.2 million in 2010 dollars.



C-27J Spartan

Source: Alenia/Lockheed Martin

Alenia C-27J

Contractors

Prime

Alenia Aeronautica	http://www.alenia-aeronautica.it , 45, Via Campania, Rome, 00187 Italy, Tel: + 39 06 420881, Fax: + 39 06 42824528, Email: communication@alenia-aeronautica.it, Prime
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Subcontractor

Aero Vodochody AS	http://www.aero.cz , U Letiste 374, Odolena Voda, 250 70 Czech Republic, Tel: + 420 255 761 111, Fax: + 420 255 75 3225 (Center Wing Box)
Aerospace Industrial Development Corp (AIDC)	http://www.aidc.com.tw , No 111-X60, Lane 68, Fu-Hsing N Rd, Taichung, 40722 Taiwan, Tel: + 886 4 270 70001, Fax: + 886 4 228 42849 (Horizontal and Vertical Tail Assemblies)
ELDEC France	18, Rue du 35eme Regiment d'Av, Bron, 69500 France, Tel: + 33 478 261010, Fax: + 33 472 377230 (Proximity Sensors)
GE - Aviation Systems, Dowty Propellers	http://www.geaviationsystems.com , Anson Business Park, Cheltenham Rd E, Gloucester, GL2 9QN United Kingdom, Tel: + 44 1452 716000, Fax: + 44 1452 716001 (Propeller)
Honeywell Aerospace, Engine Control Systems	http://www.honeywell.com/sites/aero/Engine_Controls.htm , 2525 W 190th St, Torrance, CA 90504-6099 United States, Tel: + 1 (310) 323-9500, Fax: + 1 (310) 512-2221 (APU Development)
Loud Engineering & Manufacturing	1055 E Francis St, Ontario, CA 91761 United States, Tel: + 1 (909) 947-1313, Fax: + 1 (909) 947-0532, Email: sales@loudeng.com (Landing Gear)
Rolls-Royce Corp	http://www.rolls-royce.com/northamerica , PO Box 420, 2001 S Tibbs Ave, Indianapolis, IN 46206-0420 United States, Tel: + 1 (317) 230-2000, Fax: + 1 (317) 230-4020 (AE 2100 Turboprop Engine)

Comprehensive information on Contractors can be found in Forecast International's "International Contractors" series. For a detailed description, go to www.forecastinternational.com (see Products & Samples/Governments & Industries) or call + 1 (203) 426-0800.

Contractors are invited to submit updated information to Editor, International Contractors, Forecast International, 22 Commerce Road, Newtown, CT 06470, USA; rich.pettibone@forecast1.com

Technical Data

(C-27J)

Design Features. High-wing design of conventional all-metal construction and retractable tricycle landing gear.

	<u>Metric</u>	<u>U.S.</u>
Dimensions		
Length overall	22.70 m	74.458 ft
Height overall	9.80 m	32.146 ft
Wingspan	28.70 m	94.167 ft
Cabin length	8.58 m	28.146 ft
Cabin width	2.45 m	8.042 ft
Cabin height	2.25 m	7.375 ft
Weight		
Operating weight, empty	16,500 kg	36,376 lb
Max T-O weight	30,500 kg	67,241 lb
Capacities		
Standard fuel	12,320 liters	3,255 gal
Max payload	11,500 kg	25,353 lb

Alenia C-27J

	<u>Metric</u>	<u>U.S.</u>
Performance		
Max cruise speed	583 kmph	315 kt
Range, max payload	1,852 km	1,000 nm

Propulsion

C-27J (2) Rolls-Royce AE 2100D2 turboprop engines rated about 3,460 kW (4,640 shp) each.

Seating

2 pilots and 2 loadmasters plus up to 68 passengers or 46 paratroopers or 36 stretchers and 6 medical attendants.

Program Review

Background. The C-27J evolved from the earlier Aeritalia (now Alenia) G.222, a STOL transport powered by two Rolls-Royce Dart turboprops and four RB163 liftjets. It cruised at 300 kmph at 14,000 feet, and carried 32 paratroopers or 40 fully equipped troops, or, at times, six Orpheus turbojets, which were quite common in the Italian Air Force at the time.

Approximately 110 were built for Italy and a number of export customers before production ceased in 1988.

Link with Lockheed Martin

In 1995, Alenia announced plans to develop a C-27J variant featuring an updated cockpit and updated Allison (Rolls-Royce) AE 2100 engines. The manufacturer enlisted Lockheed Martin's marketing assistance as part of the offset arrangements following an Italian Air Force purchase of the U.S. company's new C-130J. The plan called for the C-27J to represent the "lo" portion of a proposed hi-lo transport package, with the new Hercules model assuming the heavier lift, or "hi" role. Thus, the Italian-American team offered sales prospects a mix of the two types.

A prototype, a converted G.222, flew in 1999. The aircraft received its Italian civil certification in mid-2001 and Italian military certification in January 2002.

The Italian Air Force ordered five aircraft in mid-2002, and converted seven options in December 2003. Greece ordered 12 aircraft in January 2003.

Exit Lockheed, Enter L-3 Communications

In February 2005, Alenia and Lockheed Martin ended their partnership for marketing the C-27J in the U.S., and the Italian manufacturer linked up, through its North American subsidiary, with L-3 Communications Integrated Systems to form Global Military Aircraft Systems (GMAS) instead. The new team will also pursue international sales of the aircraft.

Lockheed still has responsibility for marketing the C-27J in several countries, but the U.S. company has provided no details of its role in the new relationship. Alenia has said that Lockheed is still "firmly engaged as the major systems supplier of the aircraft's propulsion and avionics systems."

In March 2005, Alenia unveiled the first aircraft ordered by Greece. This C-27J underwent preliminary acceptance trials in April prior to formal handover to Greece in May of that year.

Selected for Joint Cargo Aircraft Program

The Pentagon announced in June 2007 that it had selected the C-27J for its Joint Cargo Aircraft program over a rival bid centered on the EADS CASA C-295. L-3 was chosen as prime contractor and awarded a firm-fixed-price contract for production of up to 78 aircraft. Alenia North America and Boeing Integrated Defense Systems, which is not a part of the GMAS team but was brought on board for the JCA program bid, are subcontractors for the program.

Although EADS CASA entered a protest with the U.S. Government Accountability Office regarding the decision, the GAO later upheld the selection of the C-27J. The GAO noted that the Army picked the C-27J despite its higher cost because it was worried that the C-295 could not meet "threshold" minimum service ceiling requirements while loaded with a full crew, 12,000 pounds of cargo, and enough fuel to fly a 1,200-nautical-mile mission profile with a 45-minute reserve. EADS CASA had promised that the C-295 could meet this requirement, but only in a new configuration that had yet to achieve certification from the FAA.

The contract award included pilot and loadmaster training, and contractor logistics support for the U.S. Army and Air Force. The contract consists of three 12-month ordering periods for low-rate initial

Alenia C-27J

production and two 12-month options for full-rate production. The current structure of the deal allows the services flexibility in the number of aircraft to be ordered in any given year, with all aircraft to be delivered within 24 months after the initial order.

The program was substantially altered in early 2009 as part of the FY10 budget process. In a major shift of program management, Pentagon leadership shifted control of the JCA program to the Air Force. Secretary of Defense Robert Gates told the House Armed Services Committee at the time that the program requirement would be cut from 78 to 38 aircraft, enough to recapitalize the Army's C-23 Sherpa fleet. Gates argued that the JCA cost two-thirds as much as a C-130 but

carries only half the payload. He also noted that the C-130 could use almost all the runways and strips that could be used by a C-27J. Regarding the Army leadership's complaints that the Air Force would not fly its C-130s without full load, thus cutting down the frequency of trips offered by the C-27, Gates told lawmakers, "That's got to change."

The C-27J is produced by Alenia in Italy. Boeing and Alenia attempted to work out a deal to collaborate on a facility to build the Pentagon's C-27Js in the U.S. throughout 2008, but the on-again/off-again relationship never reached fruition. The Pentagon's decision to cut its requirement for the C-27J to 38 aircraft means that all JCA aircraft will likely be built in Italy.

Related News

Air Force Develops New C-27J Training Center – The U.S. Air Force officially opened a new C-27J training center in December 2009 at Robins Air Force Base in Georgia. The school had already been in operation at Robins since September 2009, when the first of two C-27J planes arrived there. (U.S. Air Force, 12/09)

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Funding

U.S. FUNDING

	FY08 QTY	FY08 AMT	FY09 QTY	FY09 AMT	FY10 QTY	FY10 AMT	FY11 (Req) QTY	FY11 (Req) AMT
JCA Program - Army Adv. Proc.	4	156.0	7	261.7	0	0	0	0
JCA Program - Air Force Adv. Proc.	0	0	0	0	8	318.0	8	351.2
RDT&E 0401138F		20.3		16.3		9.3		26.4
Total		176.3		278		327.3		377.6

All \$ are in millions.

Contracts/Orders & Options

(As of May 2010)

Operator	Designation	Quantity	Phase
Bulgaria Air Force	C-27J	3	On Order
Greece Air Force	C-27J	3	On Order
Greece Air Force	C-27J	3	Option

Alenia C-27J

Operator	Designation	Quantity	Phase
Morocco Air Force	C-27J	4	On Order
Romania Air Force	C-27J	5	On Order
United States Army	C-27J	11	On Order

Timetable

<u>Month</u>	<u>Year</u>	<u>Major Development</u>
Jul	1970	Prototype first flight
Jul	1971	Second prototype flight
Dec	1971	Prototype delivered for service evaluation
	1975	First flight of production-standard G.222
Late	1976	Initial production deliveries
Late	1978	Tyne-powered G.222T version announced
May	1980	G.222T first flight
Early	1981	Initial G.222T deliveries
Aug	1990	G.222 selected by USAF for C-27A requirement
Aug	1991	Initial C-27A deliveries to USAF
Dec	1992	Completion of 10 C-27A deliveries to USAF
	1995	G.222J/C-27J model proposed
Feb	1996	Lockheed, Alenia agree to market C-130J, C-27J jointly
	1996	Final G.222 deliveries to Royal Thai Air Force
Sep	1999	C-27J prototype first flight
Feb	2005	L-3, Alenia form partnership
Jun	2007	C-27J selected for Pentagon's JCA program

Worldwide Distribution/Inventories

(As of May 2010)

Operator	Designation	Quantity
Bulgaria Air Force	C-27J	2
Greece Air Force	C-27J	9
Italy Air Force	C-27J	12
Lithuania Air Force	C-27J	3
Romania Air Force	C-27J	2
United States Army	C-27J	2

Forecast Rationale

Two Pentagon decisions made in the spring of 2009 drastically changed the outlook for Alenia Aeronautica's C-27J program. The first was the decision to transfer control of the \$2 billion Joint Cargo Aircraft (JCA) program from the Army to the Air Force. At the same time, the Pentagon announced that it would cut the

number of aircraft to be procured under the JCA program in half, from 78 aircraft to 38.

The JCA program began when the Army decided it needed to replace its fleet of elderly Shorts C-23 Sherpa transports, which were being heavily used for the intra-

Alenia C-27J

theater lift mission in Iraq. The total Army requirement was expected to run to 54 aircraft, or enough to entirely replace its Sherpa fleet. Initially known as the Future Cargo Aircraft (FCA) program, the program later morphed into the JCA program when the U.S. Air Force decided that it, too, required a new tactical transport.

The Air Force has often seemed to be participating in the program only as part of a bureaucratic maneuver to limit the Army's fixed-wing aviation fleet. The Air Force listed plans to acquire 56 JCA aircraft in its FY08 budget documents, but a year later the figure had been cut to 24 aircraft, where it has since remained in subsequent budgets. Unlike the Army, the Air Force did not enter the program with a clear idea of where the C-27J would fit in its force structure. The service has made it clear that it believes the Lockheed Martin C-130J is adequate for the intratheater lift mission. The forecast for the C-27J assumes that the Air Force will purchase only enough aircraft to fill the new 38-aircraft requirement and will procure variants of the C-130J in the future in place of the C-27J. The C-130J has four engines rather than two, allowing it a greater margin of safety if an engine fails while operating from hot and high airfields like those found in Afghanistan.

An Air Force Special Operations plan to buy 16 additional C-27Js for modification into gunships was floated in 2008, but the plan has since been shelved.

Under the current contract with the Pentagon, the number of C-27Js to be bought will be determined annually by exercising an option under an umbrella contract. The Army procured two aircraft in FY07. These aircraft were delivered on schedule in 2008. It procured another four in FY08 and seven in FY09. Deliveries of these aircraft will run through 2011. The USAF procured its first C-27J in 2010. Plans call for a total of 25 aircraft to be procured from FY10 through FY12. Deliveries under this schedule would be completed in 2014.

Outside the JCA program, the C-27J has been purchased by a number of European nations, including Italy (12 aircraft), Greece (12), Lithuania (3), Bulgaria (5), and Romania (7). The Slovak Republic selected the C-27J for a two to three aircraft requirement in December 2008 but had not signed a contract by the middle of 2010. Bulgaria is considering canceling two of the five aircraft it ordered due to a shortage of funding. Defense budgets are under pressure all across Europe, putting a portion of the backlog for the C-27J in danger.

In Africa, Morocco has also ordered four aircraft. In Asia, Taiwan has chosen the C-27J over the EADS CASA CN-235 for a six-aircraft requirement handled through the U.S. Foreign Military Sales program. The Defense Security Cooperation Agency notified

Congress in September 2009 that Ghana is a possible customer for four aircraft in what is estimated to be a \$680 million deal.

Australia is looking to replace its fleet of DHC-4 Caribous with 12 C-27Js. The Australian government was reported in March 2007 to have reversed an earlier selection of the C-295 because of the C-27J's interoperability with the RAAF's existing fleet of C-130J transports. Canada, meanwhile, is likely to order at least 15 C-27Js to replace its 40-year-old DHC-5 Buffalo aircraft and take some of the load off its overworked C-130 fleet. A plan to order the aircraft was put on hold in June 2007. A new acquisition program could feature additional bids based around the EADS CASA C-295 and a military version of the Bombardier Q400 regional airliner, but the C-27J must be considered the front runner due to the prior preference for the aircraft by the Canadian military.

India, Germany, and France operate large numbers of aged twin-engine transports but are not expected to provide opportunities for the C-27J. India has a large number of Antonov An-32s to replace, but it does not plan on replacing the aircraft with an aircraft of a similar size. Instead, it has entered into a program to develop a multirole transport in a joint venture with the Russian government based on the much larger Ilyushin Il-214. Likewise, Germany and France plan to replace aging C-160 Transalls in their inventories with the four-engine Airbus A400M.

South Africa was reported in February 2010 to be considering buying up to 12 twin-engine transports to replace its fleet of ancient C-47s and a small number of C-130s. One option under consideration is a nine-unit order for C-27Js through the U.S. Foreign Military Sales program. The country's need for new transport aircraft is amplified by the government's decision to pull out of the Airbus A400M program.

Alenia has not given up hope on an Indian sale. Press reports in July 2008 indicated that the company was negotiating with India's Tata Group to enter into a marketing and industrial cooperation agreement to promote the sale of the C-27J and military versions of the ATR turboprop regional airliner to the Indian government.

Taiwan's Ministry of National Defense was reported in May 2009 to be considering ordering six C-27Js. The government-owned Aerospace Industrial Development Corporation makes the horizontal and vertical tail assemblies for the aircraft, so the procurement would be a natural fit.

Orders for medium/light transports are typically in the single digits and only occasionally cross into double

Alenia C-27J

digits. We do not expect this trend to change. The forecast for the C-27J assumes that Alenia will pick up one to three new customers each year, leading to a long-term production rate of 10-15 aircraft per year through 2019.

Ten-Year Outlook

ESTIMATED CALENDAR YEAR UNIT PRODUCTION												
Designation or Program	High Confidence					Good Confidence			Speculative			Total
	Thru 2009	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019	
Alenia Aeronautica												
C-27 J <=> AE 2100												
	33	9	10	11	12	13	13	12	13	12	13	118
Total	33	9	10	11	12	13	13	12	13	12	13	118

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Binder & RT	\$45	\$85	DVD	\$50	\$95	(A Subset of G&I above)		
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