

The Market for Military Transport Aircraft 2018-2027



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As an added benefit, the Complete Data Package is neatly presented in an elegant zipper case that is ideally suited for executive presentations.

Analysis 2

The Market for Military Transport Aircraft

2018-2027

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The Market for Military Transport Aircraft

Executive Summary

Forecast International projects that manufacturers of military transports will deliver 776 new aircraft from 2017 through 2026. The value of this production will total about \$58.5 billion.

The military transport market is relatively stable, with total production over the next decade expected to be only about 10 percent higher than the total number of military transports delivered during 2007-2016.

The market for heavy transports is the most active sector in the segment. This category includes the Airbus A400M, Antonov An-70, Embraer KC-390, Ilyushin Il-76/476, Kawasaki C-2, Lockheed Martin C-130J, and Shaanxi Y-8. China is also working on an all-new jet-powered transport, the Y-20, that could be built in large numbers if it enters full production.

The market for medium transports includes the Leonardo Aircraft C-27J, Airbus C-295/CN-235 family, and Xi'an's MA60/M600 family of turboprops. Production of medium transports will total 194 aircraft during the forecast period. Airbus will lead the segment by a wide margin due to the current popularity of the C-295 twin-engine transport.

Meanwhile, the light military transport segment will remain moribund during the forecast period. Manufacturers are forecast to turn out just over 50 aircraft over the next decade. The payload/range mix offered by light military transports, which include the

PZL Mielec M28 Skytruck and Airbus/IPTN C-212 family, is too small for most intra-theater lift missions. Most militaries rely on helicopters for missions that these twin-engine utility aircraft can handle.

The military transport market is less competitive than many other segments of the aviation market. The heavy, medium, and light segments each tend to be dominated by only one or two manufacturers. Brazilian aircraft manufacturer Embraer's launch of the KC-390 transport – an aircraft designed to compete directly with Lockheed Martin's C-130J – will increase competition in the heavy segment. Also, Kawasaki plans to sell the all-new C-2 transport on the international market as the Japanese government loosens restrictions on defense-related exports.

Now that production of the Boeing C-17 has ended, the A400M will be the only large Western transport capable of meeting the needs of customers searching for a strategic transport. The global market for strategic transports is limited in size, but the A400M will benefit from the lack of competition over the long term.

Russia is upgrading the Ilyushin Il-76 design to serve as a replacement for the many elderly transports in its fleet, and it may export a few to its traditional customer base. However, the age of the Il-76 design will prevent it from selling in high numbers.

* * *

PROGRAMS

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

Airbus A400M
Airbus/IAe C-212 Series
Airbus/IAe CN-235/C-295
Antonov An-70
Embraer KC-390
Kawasaki C-2/P-1
Leonardo C-27J
Lockheed Martin C-130 Hercules
PZL Mielec M28
Supplemental Programs - Military Aircraft: Transports
Xi'an MA60/MA600 Series

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