

The Market for Special Mission Military Aircraft

2019-2028



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Analysis 4

The Market for Special Mission Military Aircraft 2019-2028

Table of Contents

Executive Summary	2
Introduction	3
Trends	3
Competitive Environment	12
Market Statistics	14
Figure 1 - Special Mission Military Aircraft Unit Production 2019-2028 (Bar Graph)	15
Figure 2 - Special Mission Military Aircraft Value of Production 2019-2028 (Bar Graph)	15
Table 1 - The Market for Special Mission Military Aircraft Unit Production by Headquarters/Company/Program 2019 - 2028	16
Table 2 - The Market for Special Mission Military Aircraft Value Statistics by Headquarters/Company/Program 2019 - 2028	18
Figure 3 - Special Mission Military Aircraft Unit Production % Market Share 2019-2028 (Pie Chart)	20
Figure 4 - Special Mission Military Aircraft Value Statistics % Market Share 2019-2028 (Pie Chart)	20
Table 3 - The Market for Special Mission Military Aircraft Unit Production % Market Share by Headquarters/Company 2019 - 2028	21
Table 4 - The Market for Special Mission Military Aircraft Value Statistics % Market Share by Headquarters/Company 2019 - 2028	22
Conclusion	23

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The Market for Special Mission Military Aircraft

Executive Summary

Forecast International projects that a total of 515 new-build special mission military aircraft will be produced from 2018 through 2027. The value of this production is projected to reach \$75.6 billion. These totals exclude the market for conversions of existing airframes to special mission roles.

The United States government is by far the largest single customer for new-build special mission aircraft. It is forecast to account for 67 percent of the value of the market during the next decade, making it the most U.S.-centric of any aircraft market.

The Pentagon is funding development and/or production of a number of new special mission aircraft, including the Boeing P-8A Poseidon and EA-18G Growler, the Boeing KC-46 tanker, special mission variants of the Lockheed Martin C-130J, and the Northrop Grumman E-2D airborne early warning and control (AEW&C) aircraft. These aircraft are costly to build and maintain, but they are also "force multipliers" that greatly enhance the combat power of U.S. military operations.

Outside the United States, many nations recognize the value of special mission aircraft, but the cost of buying and maintaining these aircraft is too high for all but a few well-funded militaries. Instead, most militaries rely on conversions of used aircraft or do without special mission aircraft altogether. For nearly all the nations that can afford the aircraft, procurement rates are low.

New-build special mission aircraft also are not the only choice for operators. Manufacturers offer conversions of civil turboprop airliners or business jets into special mission aircraft via the installation of new mission systems. These conversions can be performed on both new aircraft and aircraft acquired on the used market, a factor that helps constrain demand for new, purpose-built platforms.

The Boeing Company is forecast to be the single largest manufacturer of new special mission aircraft. Northrop Grumman and Lockheed Martin are also major players in this market. In fact, U.S. manufacturers are forecast to account for over 85 percent of the production of new special mission aircraft during the forecast period, primarily due to the high levels of funding the U.S. military pours into special mission aircraft programs. Japan's Kawasaki and Europe's Airbus will also have significant shares of the market.

European militaries need more special mission aircraft in order to be fully prepared to conduct the full spectrum of air combat operations, but they have tended to rely on U.S. military capabilities in this area to avoid the cost of building and maintaining their own fleets. There is now a little movement toward beefing up special mission capabilities in Europe, but the market will remain U.S.-centric.



Northrop Grumman E-2D

Source: U.S. Naval Air Systems Command

PROGRAMS

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

Airbus A330 MRTT
Boeing F/A-18E/F Super Hornet
Boeing KC-767/KC-46A
Boeing P-8A Poseidon
Kawasaki C-2/P-1
Lockheed Martin C-130 Hercules
Northrop Grumman E-2D Advanced Hawkeye
Supplemental Programs - Military Aircraft: Special Purpose

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