

# The Market for Fighter Aircraft

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## 2019-2028



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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 1

## The Market for Fighter Aircraft 2019-2028

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# The Market for Fighter Aircraft

## Executive Summary

Manufacturers of fighter aircraft are forecast to build almost 3,250 fighters from 2018 through 2027. The value of this production is estimated at over \$249 billion in 2018 dollars. Production will peak at 380 aircraft in 2021. Annual production will then decline slightly each year through 2027, falling to 269 aircraft that year.

Lockheed Martin's F-35 will account for the largest share of fighter production over the next decade, due primarily to its selection as the tactical fighter of choice for the U.S. Air Force, Navy, and Marine Corps.

The F-35 program has already secured a number of export customers, but Lockheed Martin must continue to reduce the procurement and operating costs of the aircraft if it is to achieve sales expectations on the world market.

The outlook for the remaining U.S. fighters – the Boeing F-15 and F/A-18E/F Super Hornet and Lockheed Martin's own F-16 – was once grim but has improved in recent years. While many of the U.S. government's allies – traditionally the best customers for U.S. fighters – will likely buy the F-35s, uncertainty over the F-35's capabilities and the high cost of early production aircraft are leading others to consider legacy U.S. aircraft.

One key market for legacy aircraft from the U.S. and Europe is the Middle East. Orders from energy-rich

customers in the region are helping to extend production lines at Boeing, Lockheed Martin, Dassault and the Eurofighter consortium.

Meanwhile, Russia's United Aircraft Corporation (UAC) will continue to provide fighters to nations outside the U.S. and European defense spheres. China is a potential competitor in this submarket, but has yet to fully develop a solid export program for its most advanced fighters.

The most promising markets for China are in Africa and Asia. It offers the JF-17 light fighter in cooperation with Pakistan's PAC on the export market. The aircraft is the lowest cost option for nations that need a fighter capable of engaging enemy aircraft beyond visual range. For nations that need more of a light attack aircraft capable of close-range air-to-air combat, the Korean manufacturer KAI offers the FA-50 variant of its supersonic T-50 jet trainer.

China and Russia have both developed stealth fighters to compete against the F-35, but the technical capabilities of these low-observable models are difficult to judge given the level of secrecy surrounding the programs in both nations. In any case, Russian- and Chinese-built fighters only occasionally compete with Western-built fighters in the international market, so the impact of new Russian or Chinese fighters on Western manufacturers is usually small in any given year.

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## PROGRAMS

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

Boeing F/A-18E/F Super Hornet  
Boeing F-15 Eagle  
Chengdu Aircraft J-10  
Chengdu FC-1/JF17  
Dassault Rafale  
Eurofighter Typhoon  
Hindustan Aeronautics Light Combat Aircraft (LCA)  
Korea Aerospace Industries T-50/FA-50  
Lockheed Martin F-16 Fighting Falcon  
Lockheed Martin F-35 Joint Strike Fighter (JSF)  
RAC MiG MiG-29  
Saab JAS 39 Gripen  
Sukhoi Su-27/30/34/35 Series

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