

The Market for Decoys & Dispensers 2019-2028



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Analysis 1

The Market for Decoys & Dispensers 2019-2028

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The Market for Decoys & Dispensers

Executive Summary

An estimated \$1.5 billion will be spent from 2018-2027 on the key airborne and naval decoy and dispenser programs covered in this analysis. Over this time period, a total of 11,809 units will be produced. Given the current, highly active military status of several nations, it should not be surprising that a majority of production will occur in the first half of the forecast period. From 2018-2022, 6,395 of the covered systems will be made. The years 2023-2027 will see the production of 5,414 units.

Based on this analysis, the top five manufacturers in the decoy and dispenser market from 2018-2027 will be Raytheon, BAE Systems, Lockheed Martin, Safran, and Chemring Countermeasures. Perhaps the most important element in the success of these companies is that their systems have found key installations on some of the most significant and emerging platforms, such as next-generation fighter aircraft and naval vessels.

Raytheon's ALE-55 fiber-optic towed decoy (FOTD) should see steady rates of production over the next several years for a variety of U.S. Navy airborne applications. Production for the F/A-18E/F has been well underway as a replacement for the older ALE-50 system.

U.S. procurement funding for the ALE-55 is provided in the Department of Defense's Airborne Expendable Countermeasures (AECM) program, which purchases countermeasure self-protection devices for all Navy and Marine Corps rotary-wing aircraft and tactical and other fixed-wing aircraft. Through the DoD's AECM program, \$359.4 million is scheduled to be spent through 2022 on ALE-55 units and other systems for Navy and Marine Corps applications.

Among major international decoy programs, Leonardo's BriteCloud expendable active decoy (EAD), missile countermeasures system should see also steady production. At present, the Saab Gripen fighter provides the best production prospect for the system.

Deliveries of the 36 Brazilian Air Force Gripens are scheduled to begin in 2019 and be completed in 2024.

Saab believes that a market potentially exists for some 300-450 Gripens over the next 20 years.

But BriteCloud's prospects are by no means limited to this one application. In March 2018, deliveries began to the U.K. Royal Air Force for use in combat missions following the Ministry of Defence's formal go-ahead for use of BriteCloud by Tornado GR4 crews.

Just a few months later, Leonardo announced that it had a variant under development called BriteCloud 55-T, geared toward large military transport aircraft such as Leonardo's C27-J and third-party platforms including the C-130, KC-390 and A400M.

Meanwhile, protecting ships at sea will continue to present further opportunities and challenges to decoy and dispenser makers. One of the leading naval programs is the NULKA decoy system, which Australian military leaders have called the world's most effective soft-kill anti-ship missile defense.

NULKA's electronic payloads should be produced in steady numbers over the next several years for the U.S. Navy as well as a growing list of international customers.

November 2017 saw the launch of a \$200 million upgrade effort for NULKA by BAE Systems Australia. The-20-year program will include development of a new launch system and supporting technology to enhance NULKA's effectiveness, as well as the installation of new launch systems on the ANZAC frigates, which are being upgraded as part of a six-year Midlife Capability Assurance Program.

Note: *As this analysis is a sampling of the decoy and dispenser systems market, it is not inclusive of every surface or airborne decoy and dispenser system, product, or technology. Rather, a number of lead products are surveyed to ascertain market patterns. Statistics and monetary amounts only represent systems that are currently in production, indicating where these systems are heading. From these indications and trends, an overall picture of the market is formulated.*

* * *

PROGRAMS

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

ALE-47(V)
ALE-50(V)
ALE-55
Barricade/SuperBarricade
BOL Countermeasures
BriteCloud
Dagaie/Sagaie
Miniature Air Launched Decoy (MALD)
NULKA (Mk 234/250 Decoy, Mk 53 Launcher)
Outfit DLF 2/3
Seagnat
Spirale/Saphir
SRBOC (Mk 36/53)
Vicon 78

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