
ELECTRO-OPTICAL SYSTEMS **FORECAST** SAMPLE



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Analysis 1

than external units – a default requirement for most of the next generation of fighter and stealth aircraft.

Over the 2018-2027 period, systems designed for platform internal use will account for \$7.175 billion of the total market, or 30.5 percent.

Value by Production Phase

Outside of production, the remainder of the airborne EO market expenditure supports RDT&E, O&M, and commingled/procurement efforts. These make up an EO program's pre-production period, post-production period, and a combination of pre-, in- and post-production periods, respectively.

Production makes up the largest share of airborne EO expenditure, taking almost 73.2 percent. In descending order, the rest of the market is shared among RDT&E with 12.8 percent, or about \$3.005 billion; O&M with 11.1 percent, or about \$2.618 billion; and commingled / procurement with 2.9 percent, or about \$682.2 million.

Market Leaders

"The Market for Airborne Electro-Optical Systems" includes the programs of 15 individual companies. Of these 15, the top five in terms of total market value will be Lockheed Martin, Northrop Grumman, Thales, BAE Systems, and Raytheon.

These companies show significant market dominance, splitting a combined 66.0 percent of the total value among them. The remaining seven companies split a 13.5 percent share, with unassigned "Manufacturer Varies" values possessing the remaining 20.5 percent.

The highest ranked company, Lockheed Martin, accounts for 40.7 percent of the forecast value, 292.3 percent higher than that of the second-place company, Northrop Grumman.

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