Summary

“The Global Military Rotorcraft Market 2015–2025” report offers the reader detailed analysis of the global Military Rotorcraft market over the next ten years, alongside potential market opportunities to enter the industry, using detailed market size forecasts.

The global military rotorcraft market is estimated to value US$XX billion in 2015. The market consists of four categories of rotorcraft: Multi-mission and maritime helicopter, transport, attack, reconnaissance and training. The value of the global military rotorcraft market is expected to increase at a CAGR of XX% during the forecast period, to reach US$XX billion by 2025.

“The Global Military Rotorcraft Market 2015–2025” provides detailed analysis of the current industry size and growth expectations from 2015 to 2025, including highlights of key growth stimulators. It also benchmarks the industry against key global markets and provides a detailed understanding of emerging opportunities in specific areas.

Key Findings

The global military rotorcraft market is projected to value US$XX billion in the year 2015 and is expected to record a minimal increase over the forecast period. This is because significant markets such as the US and Europe are expected to upgrade and stretch the operational lives of their existing fleets and reduce overall defense expenditure. Consequently, the market is expected to increase at a CAGR of XX% over the forecast period, to value US$XX billion by 2025. Multi-mission and maritime helicopters are expected to account for the largest share of expenditure in the global military rotorcraft market going forward, followed by attack and transport helicopters.

Key Features and Benefits

The report provides detailed analysis of the Military Rotorcraft market during 2015–2025, including the factors that influence why countries are investing or cutting expenditure on military rotorcraft. It provides detailed expectations of growth rates and projected total expenditure. The report will also provide a deep qualitative analysis of the global Military Rotorcraft sector covering sections including demand drivers, SWOT, industry trends, latest technological developments, among others. The major programs section will inform the user about programs being undertaken within the global Military Rotorcraft departments in different segments of the market.

Riding on the global largest defense spender, the US, North American region and Asia Pacific region are expected to be the primary drivers of the global rotorcraft demand over the forecast period. North America is projected to account for XX% of the global rotorcraft market, closely followed by Asia Pacific with XX% share of the total market over the next decade. Growing China’s assertiveness in territorial disputes with its neighbors, ongoing arms race among the Asian countries and strong economic growth are the primary drivers of the region’s rotorcraft market, which is forecast to grow at a CAGR of XX% to reach US$XX billion by 2025.
1 Global Military Rotorcraft Market Size and Drivers

1.1 Military Rotorcraft Market Size and Forecast 2015–2025

1.1.1 Global military rotorcraft market to show positive growth during the forecast period

The global military rotorcraft market is estimated to value US$XX billion in 2015. The market consists of four categories: attack helicopters, multi-mission and maritime helicopters, training helicopters, and transport helicopters. The market is expected to decrease over the forecast period, as most procurement are due to be complete by 2020, to value US$XX billion by 2025. Multi-mission and maritime helicopters are expected to account for XX% of the global military rotorcraft market, followed by transport and attack helicopters accounting for shares of XX% and XX% respectively. Training helicopters are expected to account for the remaining XX% of the total global market. By 2025, the cumulative global expenditure on military rotorcraft is expected to reach US$XX billion.

The chart below shows the expected military rotorcraft market value during 2015–2025:

Figure 1: Global Military Rotorcraft Market (US$ Billion), 2015–2025

Source: SDI analysis © SDI
1.2 Global Military Rotorcraft Market – Regional Analysis

1.2.1 Asia Pacific constitutes the majority share in the global military rotorcraft market

Driven by robust spending on military rotorcraft procurement mainly by India, China and South Korea, Asia Pacific is expected to account for a share of XX% of the total global expenditure on military rotorcraft. High demand in the region is primarily driven by the modernization plans of the countries in the region. The spending in this sector will be fuelled by the large procurement programs such as light utility helicopters program, Naval Multirole Helicopters (NMRH) and Light Combat Helicopters procurement by India, Z-18J and Z-18A procurement by China and Korea Attack Helicopter (KAH) program and procurement of Surion helicopters by South Korea. North America and Europe are also expected to account for a significant portion of the total global military rotorcraft market with shares of XX% and XX% respectively. The Middle East, Latin America, and Africa account for XX%, XX%, and XX% of global military helicopter expenditure respectively.

The table below gives a brief overview of the global military rotorcraft market:

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<td>North America</td>
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<td>Asia-Pacific</td>
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<td>Europe</td>
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<td>Middle East</td>
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<td>Latin America</td>
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<tr>
<td>Africa</td>
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<tr>
<td>Total Military Rotorcraft Market</td>
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</tbody>
</table>

Source: SDI analysis © SDI
The following chart shows the regional breakdown of the global military rotorcraft market:

![Figure 2: Military Rotorcraft Market Breakdown by Region (%), 2015–2025](chart.png)

Source: SDI analysis
2 SWOT Analysis of the Military Rotorcraft Market

Table 2: SWOT Analysis of the Military Rotorcraft market

<table>
<thead>
<tr>
<th>Strengths</th>
<th>Weaknesses</th>
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<table>
<thead>
<tr>
<th>Opportunities</th>
<th>Threats</th>
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Source: SDI Analysis © SDI
3 Country Analysis – Military Rotorcraft Market

3.1 United States Market Size and Forecast 2015–2025

The US is expected to retain its dominant position in the military rotorcraft market with a share of XX% during the forecast period. However, the budget cuts proposed by the government are expected to slow the growth of the sector, due to which the country is projected to post a modest growth of XX% over the next decade. After a decade of combat in Iraq and Afghanistan, the US is left with fleets of worn out and damaged helicopters. Even so, due to budgetary restraints, the country is presently undergoing large-scale upgrade and remanufacturing programs instead of investing heavily in new helicopter procurements. Such a move has led to a setback in the country’s military helicopter sector. However, with such upgrade programs expected to be too expensive over the years, the US is planning to build up to 4000 new helicopters under its US$ XX billion Future Vertical Lift (FVL) program, which is expected to develop new helicopters post 2030. This new program is aimed at replacing the country’s existing fleets of AH-64 Apache, CH-47 Chinook, OH-58 Kiowa and UH-60 Black Hawk rotorcrafts with advanced new helicopters with futuristic technologies, better payload capacity, enhanced reliability and lower maintenance costs. The FVL program is preceded by the Joint Multi-Role-Technology Demonstration (JMR-TD) phases, which will include the development of the aerial platform, the air vehicle, and the mission systems.

During the forecast period, multi-mission and maritime helicopters are expected to be the largest sector in the US military rotorcraft market with a total share of XX%. The multi-mission and maritime helicopters will be followed by the transport and attack helicopters, with shares of XX% and XX% respectively over the next decade. Cumulatively, the US is projected to spend XX billion on military helicopters during 2015 to 2025.

The table below gives a brief overview of the US Military Rotorcraft market:

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<tbody>
<tr>
<td>Multi-mission and maritime Helicopters</td>
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<tr>
<td>Transport Helicopters</td>
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<tr>
<td>Attack Helicopters</td>
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<td></td>
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<tr>
<td>Training Helicopters</td>
<td></td>
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<td></td>
<td></td>
</tr>
<tr>
<td>Total US Rotorcraft Market</td>
<td></td>
<td></td>
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<td></td>
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</tbody>
</table>

Source: SDI analysis © SDI
The Global Military Rotorcraft Market 2015–2025

The chart below shows the Military Rotorcraft market size in the US between 2015 and 2025:

**Figure 3: Military Rotorcraft Market in the US (US$ Billion), 2015–2025**

<table>
<thead>
<tr>
<th>Year</th>
<th>US$ Billion</th>
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<tbody>
<tr>
<td>2015</td>
<td>15</td>
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<td>2016</td>
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<td>2017</td>
<td>22</td>
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<td>2023</td>
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<td>2024</td>
<td>23</td>
</tr>
<tr>
<td>2025</td>
<td>22</td>
</tr>
</tbody>
</table>

Source: SDI analysis © SDI

The table below shows the key US Military Rotorcraft programs:

**Table 4: Key Military Rotorcraft programs**

<table>
<thead>
<tr>
<th>Program/Equipment Name</th>
<th>Equipment Type</th>
<th>Quantity Procured</th>
<th>Supplier/Country</th>
<th>Delivery Period</th>
<th>Total Contract Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>H-1 Helicopter Upgrade</td>
<td>Attack helicopters</td>
<td>XX</td>
<td>Bell Helicopter/US</td>
<td>2009–2020</td>
<td>US$XX billion</td>
</tr>
<tr>
<td>Combat Rescue Helicopter</td>
<td>Multi-Mission helicopter</td>
<td>XX</td>
<td>Sikorsky/Lockheed</td>
<td>2014-2025</td>
<td>US$XX billion</td>
</tr>
<tr>
<td>CH-47F</td>
<td>Transport Helicopter</td>
<td>XX</td>
<td>Boeing/ US</td>
<td>2015-2022</td>
<td>US$XX billion</td>
</tr>
</tbody>
</table>

Source: SDI analysis © SDI
The following chart shows the category break-up of the military rotorcraft market in the US from 2015–2025:

Figure 4: Military Rotorcraft Market Split By Category in the US (%), 2015–2025

Source: SDI analysis © SDI
Report Methodology

Strategic Defense Intelligence (SDI) dedicated research and analysis teams consist of experienced professionals with a background in industry research and consulting in the defense sector. The market size is derived by consolidating ongoing procurement programs, modernization initiatives, and future procurement plans, utilizing information gathered through primary and secondary sources. Forecasting is conducted based on the lifetime of current inventory levels, suitability/need of the weapon category for a specific country, budget availability, and opinion of leading industry experts. The following research methodology is followed for all databases and reports.

Secondary Research

The research process begins with exhaustive secondary research to source reliable qualitative and quantitative information related to the Military Rotorcraft market. The secondary research sources that are typically referred to include, but are not limited to:

- Globally renowned think tanks
- Industry associations
- National government documents and statistical databases
- Company websites, annual reports, financial reports, broker reports, and investor presentations
- Industry trade journals and other literature
- Internal and external proprietary databases
- News articles, press releases, and webcasts specific to the companies operating in the market

Primary Research

SDI conducts hundreds of primary interviews a year with industry participants and commentators in order to validate its data and analysis. A typical research interview fulfills the following functions:

- Provides first-hand information on market size, market trends, growth trends, competitive landscape, and future outlook.
- Helps to validate and strengthen secondary research findings.
- Further develops the analyses team's expertise and market understanding.

The participants who typically take part in such a process include, but are not limited to:

- Industry participants: CEOs, VPs, business development managers, market intelligence managers, and national sales managers.
- External experts: investment bankers, valuation experts, research analysts, and key opinion leaders specializing in defense markets.
Conventions

- Currency conversions are performed on the basis of average annual conversion rate format calculations.
- All the values in tables, with the exception of compounded annual growth rate (CAGR) and compounded annual rate of change (CARC) are displayed to one decimal place. Growth rates may, therefore, appear inconsistent with absolute values due to this rounding method.

Related Reports

The Global Military Radar Market 2014-2024


The Global Electronic Warfare (EW) Market 2014-2024

The Global Cybersecurity Market 2014-2024
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