



June 16, 2009 12:30 AM Pacific Daylight Time 

## Replacements and Modernization Drive \$380 Billion in World Combat Aircraft Revenues Through 2019, According to New Research from G2 Solutions

KIRKLAND, Wash.--(BUSINESS WIRE)--A new research note (AB082) from G2 Solutions ([www.g2globalsolutions.com](http://www.g2globalsolutions.com)) "Combat Aircraft Markets: Analysis and Outlook" is available. The 30-page research note presents combat aircraft and selected avionics market analysis from 2008 to 2019.

World Air Forces are at various combat aircraft replacement and upgrade cycles. Most NATO countries are in an active replacement phase for their 1970s designed aircraft while emerging nations such as India will evaluate entirely new aircraft sources in the near future. More than 5,000 combat aircraft will be entering service globally over the next decade, with a peak of 524 deliveries in 2014.

Programs such the Lockheed Martin F-35 are set to dominate the marketplace through 2029 while G2 Solutions expects aircraft such as the Dassault Rafale to gain more traction on the export market through 2014. "Rafale has had issues with some export tenders this decade, due to a mix of unfavorable political considerations and system overall technical maturity," said Michel Merluzeau, G2 Solutions' Managing Partner. "However, the outlook has improved, with market potential for Rafale around 300 aircraft to 2019, more if it wins the Indian MMRCA competition."

Airframes of concern this decade include the Saab Gripen and Boeing F-15 Silent Eagle (SE). Gripen has been relatively successful, but now competes for tenders in Brazil and India where the aircraft is clearly at a disadvantage against the Boeing F-18E or Dassault Rafale. Failure to gain additional orders might see the program come to a standstill by 2015, however there are smaller opportunities such as Argentina that are possibly ideally suited for Gripen. "The upgraded F-15SE is an interesting niche option for existing F-15 operators, but the market opportunity window is tight and the addressable market is probably fewer than 100 aircraft," stated Merluzeau.

The study also highlights the remarkable longevity of the Lockheed Martin F-16 series, soon to be supplanted by the F-35. Thirty years since its entry in service, G2 Solutions analysis predicts that more than 200 F-16s have/will be delivered between 2008 and 2019. Lockheed Martin will maintain a commanding lead with a market share greater than 43%, ahead of Boeing, AVIC1, Eurofighter-EADS and Dassault Aviation.

### About G2 Solutions

G2 Solutions provides customers with comprehensive, expert and cost effective market intelligence services. Research notes deliver time and market critical information, and are selected by relevance and expert analysis provided to our customers.

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