

# **GPEC MARKET INTELLIGENCE PROGRAM**

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**PILOT: AEROSPACE & DEFENSE**



**Greater Phoenix**  
ECONOMIC COUNCIL

# MARKET INTELLIGENCE: A&D

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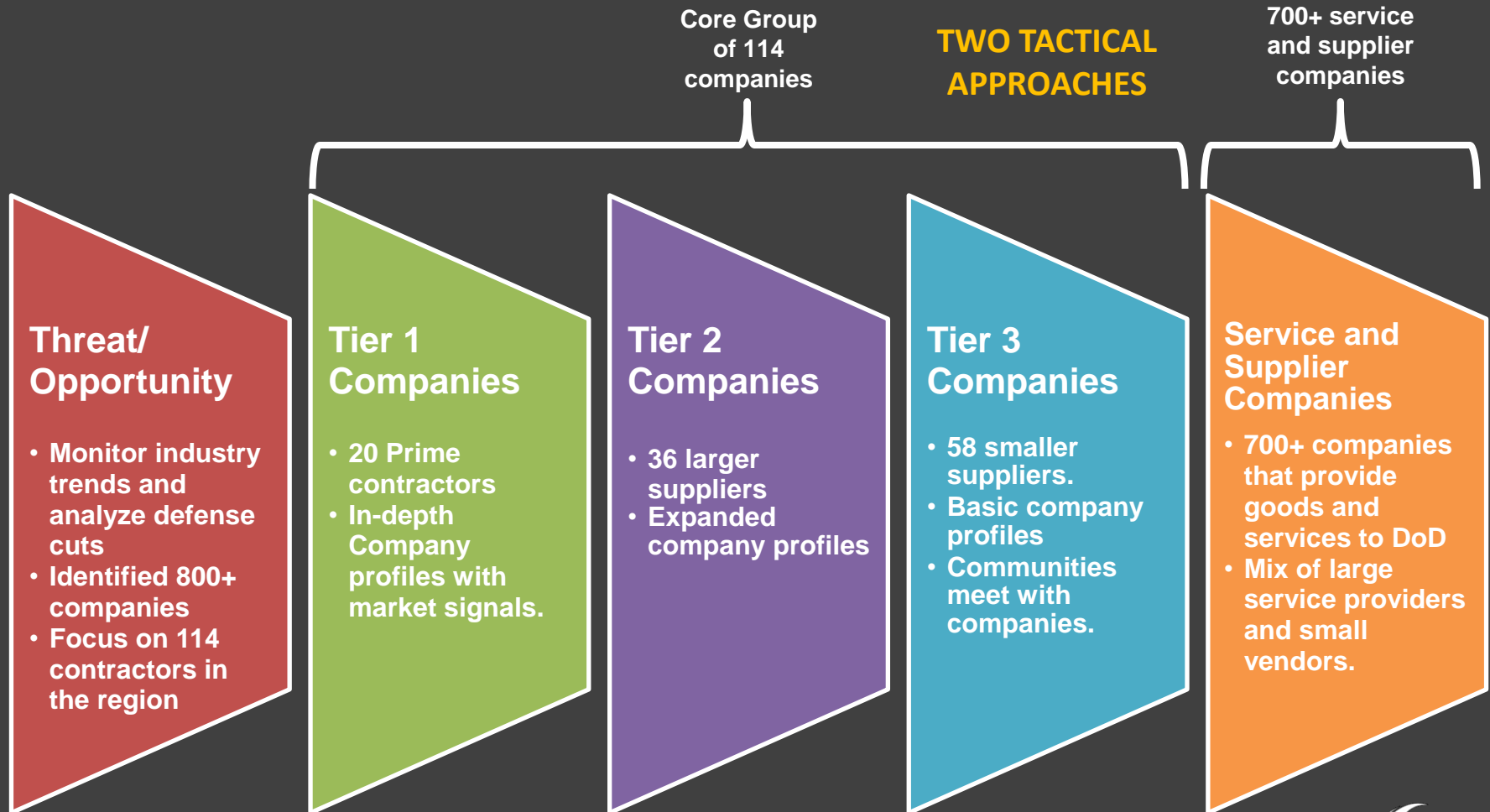
- Regional approach to track and monitor clusters to quickly respond to opportunities and threats.
- Pilot program focused on region's aerospace and defense industries.
- GPEC's program provides analysis on cuts to defense contracts and in-depth due diligence on tier 1 and 2 companies (primary contractors, large suppliers, technology companies).

# MARKET INTELLIGENCE: A&D TRENDS

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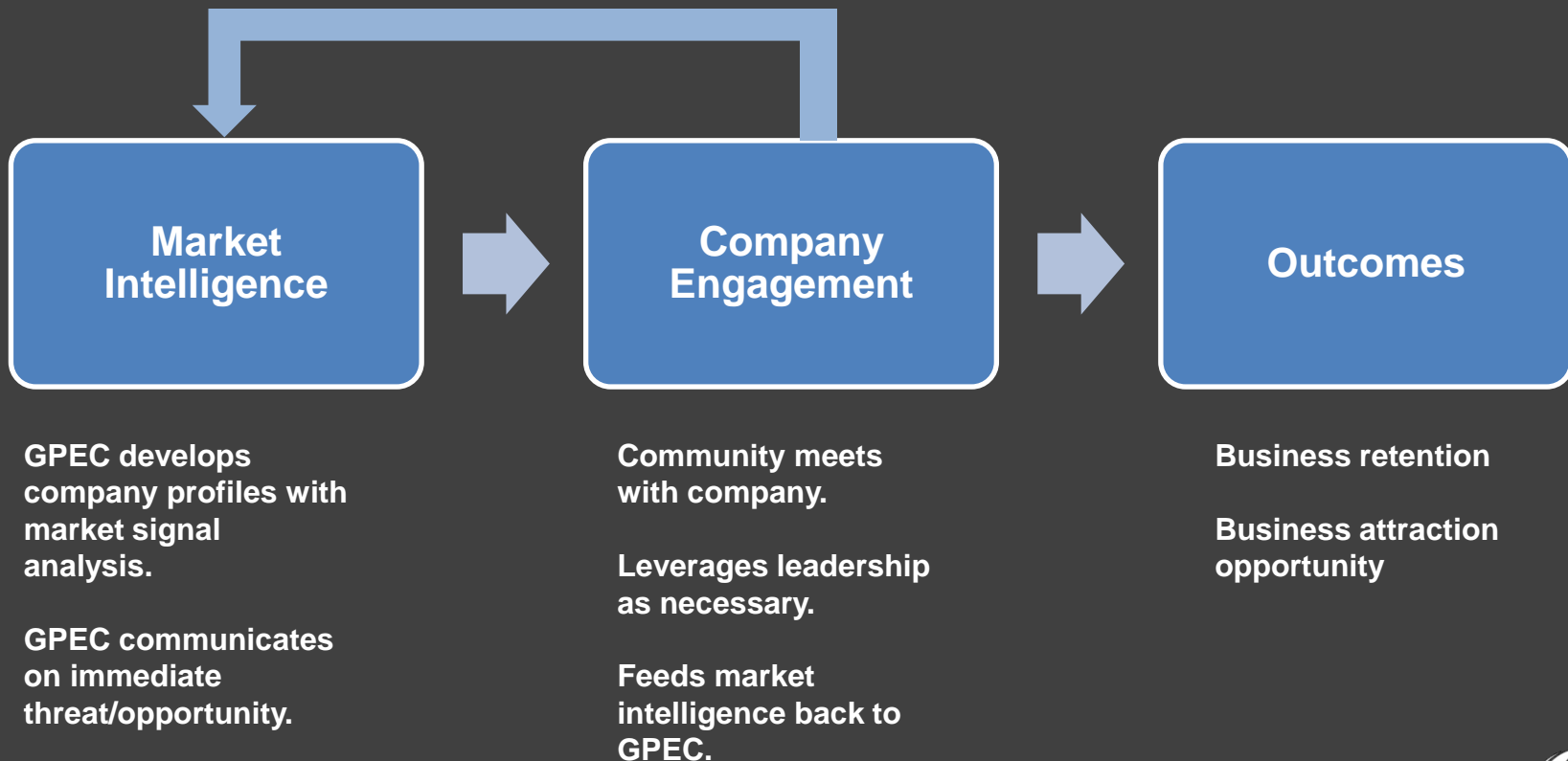
- Nationally, \$480B in defense cuts over next 10 years. Potentially another \$500B in cuts.
- Arizona had the 5<sup>th</sup> largest share of defense contracts in 2011.
  - The top five states: Virginia (\$43.0B), California (\$40.8B), Texas (\$32.4B), Maryland (\$13.6B) and Arizona (\$13.1B).
- Top prime contract products and services in AZ are:
  - Guided Missiles: \$2.2B
  - Aircraft, Rotary Wing: \$925M
  - R&D - Missile & Space Systems: \$557M
- Top prime contractors in AZ are:
  - Raytheon: \$4.1B
  - The Boeing: \$901M
  - McDonnell Douglas Helicopter: \$634M
  - General Dynamics: \$571M
  - Honeywell: \$519M

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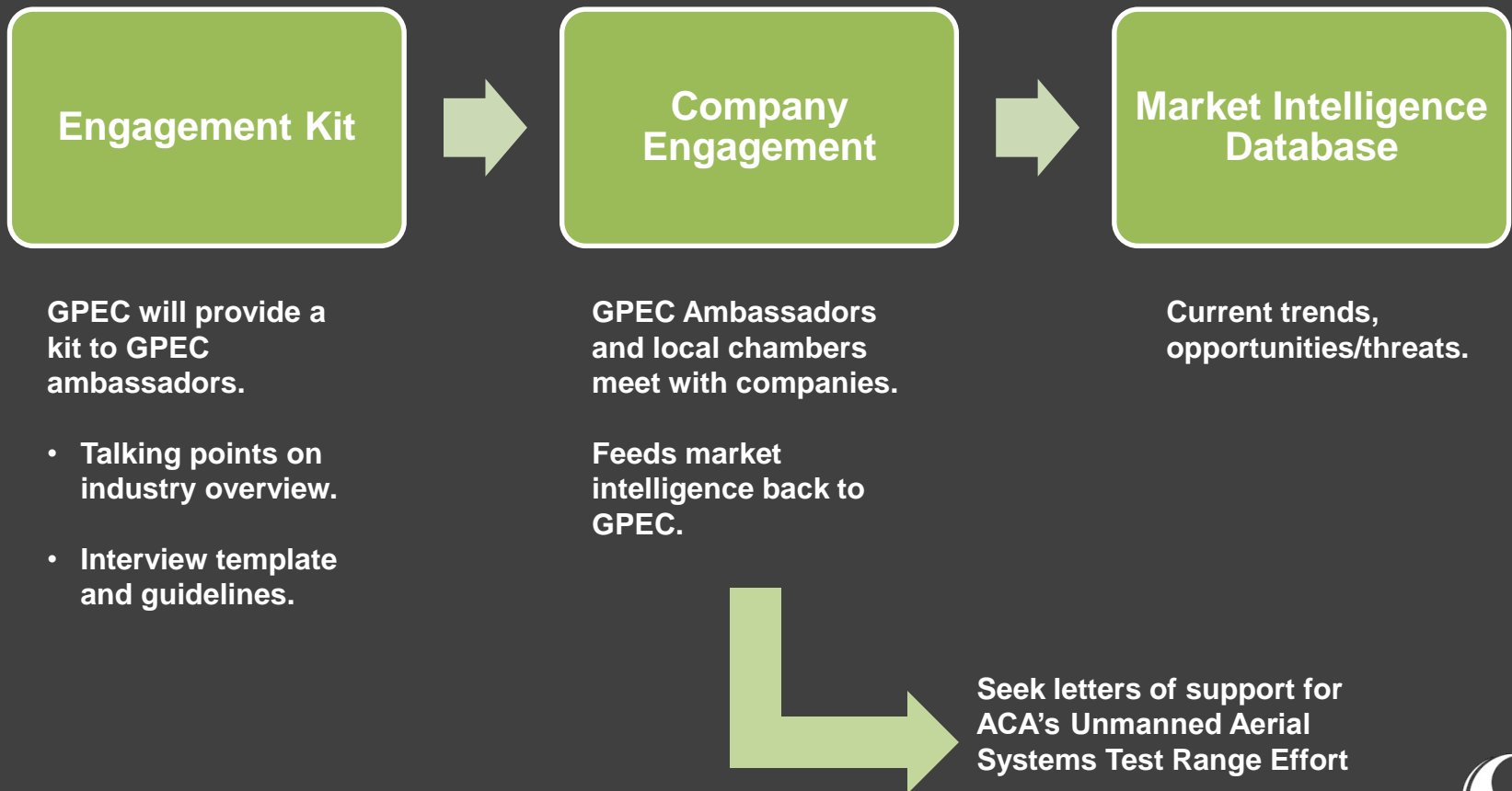
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## Engagement Process for 114 Companies:



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## Engagement Process for 700+ Service Providers and Suppliers:



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## Summary

- Robust intelligence model to get ahead of potential threats/opportunities
- Market SWOT for next-generation technologies
- Workforce talent retention