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European Fighter Production Rising (SECRET/NOFORN)

Western European jet fighter and trainer/light strike production by the national and joint aircraft industries of France, the UK, Italy and West Germany reached a five-year high in 1980. It is expected to increase still further through the mid-80s as new models reach production and export efforts intensify. The Soviet Union's 1980 fighter production, in contrast, remained at about the same level as 1979 (about three times higher than that of the non-communist Europeans). In Eastern European countries other than the USSR, production of trainer/light strike jets increased slightly.

Western European combat jet production in 1980 rose to 450 aircraft, a significant increase over the 1979 output of 325 units. Of these, 205 were fighters, which is above the 172-plane average of 1978 and 1979, but does not equal the 245-unit fighter outputs of 1976 and 1977. Belgian and Dutch assembly of the US F-16 is not included in these totals.

Western production shows a more dramatic change in the combat-capable jet trainer/light strike aircraft category. Production of this type has risen steadily from only 50 units in 1966 to 245 in 1980. The increase comes both from the need to replace older trainers in the national forces and from exports to Third World nations which cannot afford or do not choose to buy first-line combat equipment.

Two major programs will increase Western European fighter output over the next five years. The multinational Panavia Tornado (with a planned total run of over 800 aircraft) and the French Mirage-2000 will enter series production shortly, offsetting the winding down of the Anglo-French Jaguar. Some 400 Jaguars were produced, but export sales have been disappointing and the single major overseas contact, 140 aircraft for India, will probably be drastically reduced.

Prospects for increased production and sales of Western trainer/light strike jets also appear good; both the British Hawk and the Franco-German Alpha Jet are in contention for upcoming major US trainer purchases. The unique British vertical-takeoff Harrier will probably continue in production for some time to come. The future of the French Mirage-4000,

developed on speculation by Dassault-Breguet as an F-15 class fighter, is uncertain because there is no French Air Force requirement for it and no export customers have appeared as yet.

European communist combat jet production, which is primarily Soviet, has remained large but fairly constant for the last two years, at about 1,475 aircraft. The other European communist states, primarily Czechoslovakia, produced only 165 trainer/light strike aircraft in 1980, up 15 planes from 1979 but about the average maintained over the last five years.

Because it is the sole communist fighter producer and concentrates on only a few models at a time, the USSR enjoys the advantages of scale and avoids the compromises and delays which occur in multinational combat aircraft programs. Moscow also continues to produce, solely for export, an updated version of its old MiG-21, which still accounts for about 60 per cent of overseas fighter sales.

Barring a major change in export patterns or an unanticipated increase in the rate of deployment of Western fighters, Soviet output will probably remain devoted to a general upgrading program, and is therefore expected to change little over the next several years. New models, which will phase in as older aircraft are phased out of production, include the improved MiG-25 which entered series production in 1980, the Su-25 ground attack aircraft which is now coming off the line, and the RAM-L air superiority fighter which could roll out late next year or early in 1983,

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