

Malaysia Defence and Security Report Q1 2015

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Abstracts

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BMI View: Defence Spending in Malaysia will be ramped up in 2015, with a 10% budgetary increase announced in October 2014. We expect a slight increase in procurement activity while the majority of the development budget will be dedicated to expanding existing projects. The release of a new five year development plan and a review of Malaysia's defence offsetting programme could yield changes for the indigenous defence sector when unveiled in 2015. Malaysia enjoys peace and stability with regards to internal and external security threats. Key concerns include continued incursions by Filipino groups and rising piracy in regional waters.

We expect import volumes to grow in 2015 in line with the 10% year-on-year (y-o-y) defence budget increase, announced in October 2014, with development expenditure for 2015 set at USD1.0bn compared to USD0.8bn in 2014. The government has yet to announce the specific breakdown of development expenditure, but we expect investment in maritime and aviation assets. The navy will see construction of six Second Generation Patrol Vessel-Littoral Combat Ships begin in Q115, with the steel for the ships to be cut at a plant in Holland before being shipped (in a complete building kit) to the Boustead Naval Shipyard. While Malaysia's air force is set to take delivery of the first of four Airbus A400M Atlas transport aircraft in early 2015.

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