

Future of the UAE Defense Industry - Market Attractiveness, Competitive Landscape and Forecasts to 2022

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SUMMARY

The Future of the UAE Defense Industry - Market Attractiveness, Competitive Landscape and Forecasts to 2022, published by Strategic Defence Intelligence, provides readers with detailed analysis of both historic and forecast defense industry values, factors influencing demand, the challenges faced by industry participants, analysis of industry leading companies, and key news.

SYNOPSIS

This report offers detailed analysis of the UAE defense industry with market size forecasts covering the next five years. This report will also analyze factors that influence demand for the industry, key market trends, and challenges faced by industry participants.

In particular, it provides an in-depth analysis of the following -

- The UAE defense industry market size and drivers: detailed analysis of the UAE defense industry during 2018-2022, including highlights of the demand drivers and growth stimulators for the industry. It also provides a snapshot of the country's expenditure and modernization patterns
- Budget allocation and key challenges: insights into procurement schedules formulated within the country and a breakdown of the defense budget with respect to capital expenditure and revenue expenditure. It also details the key challenges faced by defense market participants within the country
- Porter's Five Force analysis of the UAE defense industry: analysis of the market characteristics by determining the bargaining power of suppliers, bargaining power of buyers, threat of substitution, intensity of rivalry, and barriers to entry
- Import and Export Dynamics: analysis of prevalent trends in the country's imports and exports over the last five years
- Market opportunities: details of the top five defense investment opportunities over the next 10 years
- Competitive landscape and strategic insights: analysis of the competitive landscape of the UAE defense industry. It provides an overview of key players, together with insights such as key alliances, strategic initiatives, and a brief financial analysis

SCOPE

- Between 2013 and 2017, the UAE's defense expenditure grew significantly, making it one of the most sought-after markets for foreign defense OEMs. The multitude of deals signed with foreign OEMs at its biennial international defense exhibitions, proves the attractiveness of the UAE's

defense market. The UAE's defense budget recorded a CAGR of 1.94% over the historic period, with expenditure driven by defense modernization programs, the protection of infrastructure, territorial disputes, and participation in peacekeeping initiatives.

- The UAE faces serious constraints with respect to a limited pool of trained manpower and still has a relatively nascent domestic defense industrial infrastructure. This forces the country to import technologically superior, high-tech defense equipment from suppliers abroad. Over the forecast period, attractive opportunities are expected to emerge in aerial platforms, missiles, naval platforms, and surveillance areas. The country is also expected to invest in reconnaissance, space, cyber security, border control, and digital warfare initiatives.
- The average capital expenditure allocation of the total UAE defense budget during the forecast period is anticipated to reach 37.8% from 35.2% in the historic period. The substantial increase in the capital expenditure percentage is a result of UAE's focus on modernizing its armed forces. During the forecasted period, the country is expected to invest in the procurement of multi-role aircraft, attack helicopters, armored vehicles, and cyber security capabilities.

REASONS TO BUY

- This report will give the user confidence to make the correct business decisions based on a detailed analysis of the UAE defense industry market trends for the coming five years
- The market opportunity section will inform the user about the various military requirements that are expected to generate revenues during the forecast period. The description includes technical specifications, recent orders, and the expected investment pattern by the country during the forecast period
- Detailed profiles of the top domestic and foreign defense manufacturers with information about their products, alliances, recent contract wins, and financial analysis wherever available. This will provide the user with a total competitive landscape of the sector
- A deep qualitative analysis of the UAE defense industry covering sections including demand drivers, Porter's Five Forces Analysis, Key Trends and Growth Stimulators, and latest industry contracts

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COMPANIES MENTIONED

Abu Dhabi Ship Building
Gulf Logistics and Naval Support
Abu Dhabi Systems Integration (ADSI)
Lockheed Martin
BAE Systems
Raytheon
Rolls-Royce
Northrop Grumman Corporation
Thales
The Boeing Company

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