

Sri Lankan Defense Market - Attractiveness, Competitive Landscape and Forecasts to 2024

URL: <https://marketpublishers.com/r/S708A96E039EN.html>

Date: June 21, 2019

Pages: 73

Price: US\$ 1,250.00

ID: S708A96E039EN

Sri Lankan Defense Market - Attractiveness, Competitive Landscape and Forecasts to 2024

SUMMARY

Sri Lankan Defense Market - Attractiveness, Competitive Landscape and Forecasts to 2024, published by GlobalData, 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.

This report offers detailed analysis of the Sri Lankan 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 defense industry market size and drivers: detailed analysis of the Sri Lankan defense industry during 2020-2024, 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 Sri Lankan 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
- Competitive landscape and strategic insights: analysis of the competitive landscape of the Sri Lankan defense industry. It provides an overview of key players, together with insights such as key alliances, strategic initiatives, and a brief financial analysis

SCOPE

- Sri Lanka's military expenditure, which stands at US\$1.8 billion in 2019, is anticipated to grow from US\$1.9 billion in 2020 to value US\$2.1 billion in 2024, registering a CAGR of 3.28% over the forecast period.
- The growth will primarily be fueled by rehabilitation initiatives by the country following the civil war; the threat of the re-emergence of LTTE affiliates, the growing influence of IS (Islamic State) and an increased focus on maritime security.

REASONS TO BUY

- This report will give the user confidence to make the correct business decisions based on a detailed analysis of the Sri Lankan 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 Sri Lankan defense industry covering sections including demand drivers, Porter's Five Forces Analysis, Key Trends and Growth Stimulators, and latest industry contracts.

Table of Content

1. INTRODUCTION

- 1.1. What is this Report About?
- 1.2. Definitions
- 1.3. Summary Methodology
- 1.4. About GlobalData

2. EXECUTIVE SUMMARY

3. MARKET ATTRACTIVENESS AND EMERGING OPPORTUNITIES

- 3.1. Current Market Scenario
 - 3.1.1. Procurement Programs
 - 3.1.2. Ongoing Procurement Programs
 - 3.1.3. Future Procurement Programs
 - 3.1.4. Key Challenges
- 3.2. Defense Market Size Historical and Forecast
 - 3.2.1. Sri Lankan defense budget to grow at a CAGR of 3.28% over 2020-2024 to value US\$2.1 billion in 2024
 - 3.2.2. The re-emergence of the LTTE and the geopolitics of the Indian Ocean, including balancing its relationships with regional superpowers, are expected to drive Sri Lankan defense expenditure
 - 3.2.3. Sri Lankan defense expenditure as a percentage of GDP is expected to decrease to an average of 1.6% over 2020-2024
- 3.3. Analysis of Defense Budget Allocation
 - 3.3.1. Capital expenditure's share of overall defense expenditure expected to decrease over the forecast period
 - 3.3.2. Capital expenditure to increase at a CAGR of 2.81% over the forecast period
 - 3.3.3. Sri Lankan Army accounts for the largest share of defense expenditure
 - 3.3.4. Budget allocation to the army is expected to remain highest over the forecast period
 - 3.3.5. Per capita defense expenditure expected to increase over the forecast period
- 3.4. Homeland Security Market Size and Forecast
 - 3.4.1. Sri Lankan homeland security expected to grow steadily over the forecast period
 - 3.4.2. Maritime security, counterterrorism, and countering violent extremism are expected to drive Sri Lankan homeland security expenditure
- 3.5. Benchmarking with Key Global Markets
 - 3.5.1. Sri Lankan defense budget expected to increase over the forecast period
 - 3.5.2. Sri Lankan defense expenditure to remain low compared to major spenders in Asia-Pacific

- 3.5.3. Sri Lanka spent over 1.8% of its GDP on defense in 2019
- 3.6. Market Opportunities: Key Trends and Growth Stimulators
 - 3.6.1. Top 10 Defense Market Sectors by Value (US\$ Million) - Projections over 2019-2024

4. DEFENSE PROCUREMENT MARKET DYNAMICS

- 4.1. Import Market Dynamics
 - 4.1.1. Defense imports are expected to remain low over the forecast period
 - 4.1.2. Sri Lanka sourced the majority of its arms imports from India
 - 4.1.3. Naval vessels dominated military hardware imports
- 4.2. Export Market Dynamics
 - 4.2.1. The country exported negligible defense goods during 2014-2018

5. MARKET ENTRY STRATEGY

- 5.1. Market Regulation
 - 5.1.1. Undisclosed FDI policy relating to defense
- 5.2. Market Entry Route
 - 5.2.1. Budgeting Process
 - 5.2.2. Procurement Policy and Process
 - 5.2.3. Cooperative agreements and partnerships an easier way to access the Sri Lankan defense market
 - 5.2.4. Equipment manufacturers enter the market through direct sales

6. COMPETITIVE LANDSCAPE AND STRATEGIC INSIGHTS

- 6.1. Competitive Landscape Overview

7. BUSINESS ENVIRONMENT AND COUNTRY RISK

- 7.1. Economic Performance
 - 7.1.1. Gross Domestic per Capita
 - 7.1.2. Gross Domestic Product, current US\$
 - 7.1.3. Exports of Goods and Services
 - 7.1.4. Imports of Goods and Services
 - 7.1.5. Gross National Disposable Income
 - 7.1.6. Local Currency Unit per USD
 - 7.1.7. Market Capitalization of Listed Companies
 - 7.1.8. Market Capitalization of Listed Companies as a Percentage of GDP
 - 7.1.9. Government Cash Surplus/Deficit as a Percentage of GDP (LCU)
 - 7.1.10. Goods Exports as a Percentage of GDP
 - 7.1.11. Goods Imports as a Percentage of GDP
 - 7.1.12. Services Imports as a Percentage of GDP
 - 7.1.13. Services Exports as a Percentage of GDP
 - 7.1.14. Foreign Direct Investment, BoP, Current Value in US\$ Billion
 - 7.1.15. Net FDI as a Percentage of GDP
 - 7.1.16. Mining, Manufacturing, Utilities Output

8. APPENDIX

- 8.1. About GlobalData
- 8.2. Disclaimer

LIST OF TABLES

Table 1: Sri Lankan Ongoing Procurement Programs

Table 2: Sri Lankan Future Procurement Programs

Table 3: Sri Lankan Defense Expenditure (LKR Billion & US\$ Billion), 2015-2024

Table 4: Sri Lankan GDP Growth vs Defense Expenditure as a Percentage of GDP, 2015-2024

Table 5: Sri Lankan Defense Budget Split Between Capital and Revenue Expenditure (%), 2015-2024

Table 6: Sri Lankan Defense Capital Expenditure (LKR Billion and US\$ Million), 2015-2024

Table 7: Sri Lankan Defense Capital Expenditure Breakdown (%), 2015-2024

Table 8: Sri Lankan Defense Budget in LKR Billion - Breakdown by Services (Army, Navy, Air Force and Others), 2015-2024

Table 9: Sri Lankan Defense Budget in US\$ Million - Breakdown by Services (Army, Navy, Air Force and Others) 2015-2024

Table 10: Sri Lankan Per Capita Defense Expenditure (US\$), 2015-2024

Table 11: Sri Lankan Homeland Security Expenditure (LKR Billion and US\$ Million), 2015-2024

Table 12: Benchmarking with Key Markets - 2015-2019 vs 2020-2024

Table 13: Top 10 Sri Lankan Defense Market Sectors by Value (US\$ Million) - 2019-2024

Table 14: Market Entry Strategies by Key Foreign Companies

Table 15: Competitive Landscape of the Sri Lankan Defense Industry

LIST OF FIGURES

Figure 1: Sri Lankan Defense Budget, 2020 and 2024

Figure 2: Sri Lankan Defense Imports/Exports, 2014 and 2018

Figure 3: Sri Lanka's Top Prospective Procurements/Developments

Figure 4: Sri Lankan Defense Expenditure (LKR Billion), 2015-2024

Figure 5: Sri Lankan Defense Expenditure (US\$ Billion), 2015-2024

Figure 6: Sri Lankan GDP Growth vs Defense Expenditure as a Percentage of GDP, 2015-2024

Figure 7: Sri Lankan defense Budget Split Between Capital and Revenue Expenditure (%), 2015-2024

Figure 8: Sri Lankan Defense Capital Expenditure (LKR Billion), 2015-2024

Figure 9: Sri Lankan Defense Capital Expenditure (US\$ Million), 2015-2024

Figure 10: Sri Lankan Defense Budget Allocation (%), 2015-2024

Figure 11: Sri Lankan Defense Budget in LKR Billion - Breakdown by Services (Army, Navy, Air Force, and Others), 2015-2024

Figure 12: Sri Lankan Defense Budget in US\$ Million - Breakdown by Services (Army, Navy, Air Force and Others) 2015-2024

Figure 13: Sri Lankan Per Capita Defense Expenditure (US\$), 2015-2024

Figure 14: Sri Lankan Homeland Security Budget (LKR Billion), 2015-2024

Figure 15: Sri Lankan Homeland Security Budget (US\$ Million), 2015-2024

Figure 16: Benchmarking with Key Markets - 2015-2019 vs 2020-2024

Figure 17: Defense Expenditure of the World's Largest Military Spenders (US\$ Billion), 2019 and 2024

Figure 18: Defense Expenditure as a Percentage of GDP of Largest Military Spenders (%), 2019

Figure 19: Sri Lankan Defense Import Trend, 2014-2018 (TIV Values)

Figure 20: Sri Lankan Defense Imports by Country (%), 2014-2018

Figure 21: Sri Lankan Defense Imports by Category (%), 2014-2018

Figure 22: Sri Lanka's Budgeting Process

Figure 23: Sri Lankan GDP Per Capita, 2016-2025

Figure 24: Sri Lankan GDP (current USD Bn), 2016-2025

Figure 25: Sri Lankan Exports of Goods and Services (LCU Bn), 2005-2010

Figure 26: Sri Lankan Imports of Goods and Services (LCU Bn), 2005-2010

Figure 27: Sri Lankan Gross National Disposable Income (USD Billion), 2005-2014

Figure 28: Sri Lankan LCU per USD, 2015-2024

Figure 29: Sri Lankan Market Capitalization of Listed Companies (USD Bn), 2005-2012

Figure 30: Sri Lankan Market Capitalization of Listed Companies as a Percentage of GDP, 2005-2012

Figure 31: Sri Lankan Government Cash Surplus/Deficit as a Percentage of GDP (LCU), 2005-2012

Figure 32: Sri Lankan Goods Exports as a Percentage of GDP, 2005-2014

Figure 33: Sri Lankan Goods Imports as a Percentage of GDP, 2005-2014

Figure 34: Sri Lankan Services Imports as a Percentage of GDP, 2005-2014

Figure 35: Sri Lankan Services Exports as a Percentage of GDP, 2005-2014

Figure 36: Sri Lankan Foreign Direct Investment, net (BoP, Current USD Bn), 2005-2014

Figure 37: Sri Lankan Net Foreign Direct Investment as a Percentage of GDP, 2005-2014

Figure 38: Sri Lankan Mining, Manufacturing, Utilities Output (LCU Bn), 2005-2014

COMPANIES MENTIONED

Bharat Electronics India

Goa Shipyard Limited

Hongdu/Pakistan Aeronautical Complex (PAC) Kamra

Rosoboronexport

Xi'an Aircraft Industrial Corporation

Israel Aerospace Industries (IAI)

Hindustan Aeronautics Limited (HAL)

Colombo Dockyard Plc. (CDPLC).

I would like to order:

Product name: Sri Lankan Defense Market - Attractiveness, Competitive Landscape and Forecasts to 2024
Product link: <https://marketpublishers.com/r/S708A96E039EN.html>
Product ID: S708A96E039EN
Price: US\$ 1,250.00 (Single User License / Electronic Delivery)

If you want to order Corporate License or Hard Copy, please, contact our Customer Service: office@marketpublishers.com

Payment

To pay by Credit Card (Visa, MasterCard, American Express, PayPal), please, click 'BUY NOW' button on product page <https://marketpublishers.com/r/S708A96E039EN.html>

To pay by Wire Transfer, please, fill in your contact details in the form below:

First name:
Last name:
E-mail:
Company:
Address:
City:
Zip/Post Code:
Country:
Tel:
Fax:
Your message:

* All fields are required

Customer Signature _____

Please, note that by ordering from MarketPublisher.com you are agreeing to our Terms & Conditions at https://marketpublishers.com/docs/terms_conditions.html

To place an order via fax simply print this form, fill in the information below and fax the completed form to **+44 20 7900 3970**