

# South East Asia Defense Market Opportunity Analysis

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## Abstracts

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Countries in the South East Asian region have begun to overcome the economic downturn and are increasing their defense spending to keep pace with their economic growth. While there has been increasing economic development it has been accompanied by greater geo-political instability in the region. While a few countries have stepped up their arms procurement programs to equip their forces, this has spurred a parallel push from other countries in the region to keep pace and to act as a deterrent. These driving factors have seen increase in military modernization programs and the purchase of UAVs, armoured vehicles, ships and aircrafts by many nations. This will pave the way for greater defense allocations and budgets and continued growth in the market for defense products for the period until 2018.

Almost every country in South-East Asia has a defense procurement program and this makes it one of the fastest-growing defense markets in the world. While greater details are provided elsewhere in this report the general trend has been that countries in this region have been adding to their sophisticated arsenal, modernizing and upgrading their equipment and arming themselves to avoid border disputes, regional security threats and as a deterrent.

South East Asian countries have been shopping around for the best price, technology and the need to be not tied to one or a small group of suppliers. Vietnam procuring from India, France and other European nations, apart from its 'regular ally' Russia while Philippines buys from its regular partner US and other nations such as South Korea, Japan and Russia and the region's largest nation Indonesia buys from South Korea, China, Russia and the US.

"South East Asia Defense Market Opportunity Analysis" research report by Kuick

Research gives comprehensive insight on following aspects related to booming Defense market opportunity in South East Asian region:

Regional & Country Level Defense Market Overview

Market Attractiveness Parameters

Defense Spending by Country

Defense Contracts

Future Buyout Plans

Defense Spending Forecast

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## About

Countries in the South East Asian region have begun to overcome the economic downturn and are increasing their defense spending to keep pace with their economic growth. While there has been increasing economic development it has been accompanied by greater geopolitical instability in the region. While a few countries have stepped up their arms procurement programs to equip their forces, this has spurred a parallel push from other countries in the region to keep pace and to act as a deterrent. These driving factors have seen an increase in military modernization programs and the purchase of UAVs, armored vehicles, ships and aircrafts by many nations. This will pave the way for greater defense allocations and budgets and continued growth in the market for defense products for the period until 2018.

We now find that almost every country in South-East Asia has a defense procurement program and this makes it one of the fastest-growing defense markets in the world. While greater details are provided elsewhere in this report the general trend has been that countries in this region have been adding to their sophisticated arsenal, modernizing and upgrading their equipment and arming themselves to avoid border disputes, regional security threats and as a deterrent.

In this attempt to arm these countries are shopping around for the best price, technology and the need to be not tied to one or a small group of suppliers. So we see Vietnam procuring from India, France and other European nations, apart from its 'regular ally' Russia while Philippines buys from its ally the US and other nations such as South Korea, Japan and Russia. The region's largest nation Indonesia buys from South Korea, China, Russia and the US.

Though there have been no confrontations or flare-ups the build-up and modernization is seen more as a "cycle of action-reaction", rather than about ultimate supremacy. This increased militarization drive and defense budget growth has made the region quite interesting for major international weapons manufacturers and exporters. This widespread defense spending run means that for the first time Asia's military spending is set to overtake that of Europe. This is in contrast to earlier times when most of Southeast Asia defense budget was towards weapons such as guns and small tanks to tackle threats that were mainly internal with the umbrella of U.S. protection being seen as a deterrent enough for international conflicts.

It mostly seems to be a case of economic success contributing to the means, needs and

the opportunity to update their hardware. Rapid economic growth and healthy defense budgets, especially after the lull brought about by the Asian financial crisis in 1997-98, has seen this market opening up. The boom in Southeast Asian economies saw defense spending growing xx percent in real terms from 2002 to 2012.

Besides concerns such as piracy, illegal fishing, smuggling, terrorism and disaster relief the defense spending in these countries has been spurred by domestic political considerations also, especially in countries where the armed forces have a greater role in politics, so that the military is in tune with the political establishment. However, for Singapore, the interest has been to build its own high-tech arms industry that is good enough to export to other countries. The basic and larger reason is, of course, the strategic interests and concerns in protecting the shipping lanes, ports and maritime boundaries that are important to the business and economic aspects of each country.

This boost in the defense market is a positive turn for makers of weapons, communications gear and surveillance systems. For example, xx% of the international revenues of Lockheed Martin and Boeing's defense division are expected to come from the Asia-Pacific region. While this is the case with imports and international suppliers, most countries are actively encouraging their domestic arms industry since it is cheaper than buying from overseas and has other long-term strategic benefits as well.

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