

Australia - Defense and Security: Increased expenditure driven by modernization efforts (Strategy, Performance and Risk Analysis)

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Abstracts

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SUMMARY

Australia registered the second-lowest conflict score in the Asia-Pacific region and fared better than its regional peers on parameters such as societal safety and security. The country's low conflict score can be attributed to the involvement of troops in global peacekeeping operations relatively weak involvement in the war on terror. The aircraft, C4ISR electronics and IT, naval ships, homeland security, and helicopter categories are considered the industries key drivers.

MarketLine's premium reports provide a comprehensive overview of each market within a country's defense industry; benchmark key performance indicators against regional and global peers; review industry trends and drivers; evaluate the competitive landscape and innovation potential of singular markets; and conduct data-driven SWOT analysis to ascertain a structured assessment of the performance of each territory represented.

KEY HIGHLIGHTS

Growing capital expenditure to partially offset a decline in total expenditure:

Capital expenditure rose at a CAGR of 14.4%, from US\$4.8 billion in 2012 to US\$8.2 billion in 2016 and will post a forecast-period CAGR of 7.0% to reach US\$11.3 billion in

2021 due to Australia's planned armed force modernization program and procurement plans.

Total expenditure decreased at a CAGR of -0.4%, falling from US\$25.2 billion in 2012 to US\$24.8 billion in 2016. However, due to government modernization efforts and the involvement of Australia's armed forces in international peacekeeping operations, defense expenditure will post a forecast-period CAGR of 5.7% to reach US\$33.1 billion in 2021.

Aircraft category to drive capital expenditure:

The aircraft category drove Australia's capital expenditure and valued US\$5.7 billion in 2016. It will post a forecast-period CAGR of 0.5% due to the Royal Australian Air Force's plans to procure 24 F/A-18F Super Hornets, six E-7A Wedgetail Airborne Early Warning and Control aircraft, 72 F-35A Lightning II joint strike fighters, 10 CH-47F Chinook helicopters, 10 C-27J Spartans, 12 upgraded C-130J Hercules and P-8A Poseidon maritime surveillance aircraft.

Australia naval ships expenditure to grow:

Australia's capital expenditure on naval ships stood at US\$2.6 billion in 2016 and will post a forecast-period CAGR of 6.6% to reach US\$3.8 billion in 2021 due to the Department of Defence's procurement of corvettes and Hobart class destroyers and submarines.

SCOPE

Industry Snapshot and Industry View - Key Defense and Security Industry Statistics including total expenditure, revenue expenditure, and capital expenditure are analysed to reveal the key issues and trends driving market performance in the Australia Defense and Security market.

Industry SWOT Analysis - Discover the Strengths, Weaknesses, Opportunities and Threats impacting market performance and investment in the Australia Defense and Security market.

Industry Benchmarking - Benchmark how the Australia Defense and Security market is performing compared to regional and global markets in terms of total expenditure, revenue expenditure, and capital expenditure to gauge potential for

growth or market entry.

Competitive Landscape - Analyze and compare the performance of the leading players in the Australian Defense and Security market by business segment on metrics such as arms sales, along with detailed overview and product offerings of the leading Defense and Security players in Australia.

REASONS TO BUY

How is the market performing in terms of: total expenditure, revenue expenditure, and capital expenditure?

How risky is it to invest in the Australia Defense and Security industry compared to other Asia Pacific countries?

What is driving the performance of key industry segments such as Naval ships, Military vehicles, Ordnance and guns, and others?

Who are the leading players in the Australian Defense and Security industry and how does their performance compare?

What trends are being witnessed within the Australia Defense and Security industry?

What are the Australia Defense and Security industry's Strengths and Weaknesses and what Opportunities and Threats does it face?

How have the financial deals landscape changed in 2015 and 2016?

What are the recent developments and innovations in the Australia Defense and Security industry?

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