

Brazil - Defense and Security: Modernization of defense systems to drive expenditure (Strategy, Performance and Risk Analysis)

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Abstracts

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SUMMARY

The aircraft category is a key growth driver of the Brazilian defense and security industry and accounted for 34.3% of capital expenditure in 2016. It was followed by the C4ISR electronics and IT category which accounted for 19.2%. Modernization initiatives increased the accountability of these segments and investments in highly fighter aircraft, submarines, and C4ISR will drive capital expenditure.

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

Sporting events to fuel homeland security expenditure:

Brazil's desire to host international sporting events boosts the country's spending on homeland security. Significant investment in command and control centers, training, and security equipment such as mobile police stations, boats, cameras, anti-bomb systems,

video-walls, radio communications, media intelligence monitoring, video-monitoring and cybersecurity software have all contributed. Homeland security spending stood at US\$3.9 billion in 2016 and will post a forecast-period CAGR of 3.9% to reach US\$4.8 billion in 2021.

Demand for low-cost and quality defense systems to stimulate exports:

Brazil's defense exports to less developed neighboring countries such as Argentina, Chile and Colombia are growing. Exports recorded a CAGR of 28.6%, from US\$31.0 million in 2011 to US\$109.0 million in 2016, owing to a demand for higher quality but low-cost systems. The government has announced plans to increase loans to defense firms to further promote arms exports.

Submarines, frigates and corvettes to drive capital expenditure growth in the naval segment:

The naval ships category reported a capital expenditure of US\$1.7 billion in 2016 and will post a forecast-period CAGR of 5% to reach US\$2.1 billion in 2021. Submarines and submersibles accounted for 42.8% of Brazil's naval ships CAPEX in 2016. Robust investments in corvettes, frigates, and amphibious ships will drive the naval vessels and MRO market in the Latin American region.

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 Brazilian defense and security market.

Industry SWOT Analysis - Discover the Strengths, Weaknesses, Opportunities and Threats impacting market performance and investment in the Brazilian defense and security market.

Industry Benchmarking - Benchmark how the defense and security market in Brazil 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 - Detailed overview and product offerings of the leading

defense and security players in Brazil.

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 Brazilian defense and security industry compared to other South and Central American countries?

What is driving the performance of key industry segments such as aircraft, C4ISR Electronics & IT, naval ships, helicopters, military vehicles, and others?

Who are the leading players in the Brazilian defense and security industry and their overview and product portfolio?

What trends are being witnessed within the Brazilian defense and security industry?

What are the Brazilian defense and security industry's Strengths and Weaknesses and what Opportunities and Threats does it face?

What are the recent developments and innovations in the Brazilian defense and security industry?

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