

Canada - Defense and Security: Truncated spends for military supremacy (Strategy, Performance and Risk Analysis)

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Abstracts

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SUMMARY

The aircraft category remains one of the key growth drivers of the Canadian defense and security industry accounting for 46.9% of capital expenditure in 2016; followed by the C4ISR category with 8.0%. Overall, Canadian defense and security CAPEX posted a CAGR of 17.3%, rising from US\$3.1 billion in 2012 to US\$5.9 billion in 2016, owing to modernization plans outlined in the Canada First Defense Strategy (CFDS). CAPEX will increase due to a considerable number of government-planned procurements.

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

Aircraft and C4ISR systems to drive capital expenditure:

Aircraft accounted for 46.9% of military CAPEX in Canada in 2016, followed by C4ISR with 8.0%. Modernization initiatives will see Canada procure F-35 fighter jets and

replace older CF-18 fighters by 2021. In addition, the government announced plans to replace obsolete jets with the cheaper F/A-18 Super Hornets. The collective share of the aircraft and C4ISR categories with regards to capital expenditure will stand at 67.2% in 2021.

Imports from the US increased during the review period:

Defense imports increased at a CAGR of 5.9%, rising from US\$205 million in 2012 to US\$258 million in 2016; sensors and radars to supplement modernization programs were the key growth drivers. The majority of the country's military hardware is imported from US-based defense contractors and it is anticipated that Canada will procure CH-47F Chinook helicopters, C-130J-30 Hercules aircraft, M-113A3 armored personnel vehicles, and AN/APS-143(V) radars over the forecast period.

Emphasis on homeland security:

Threats emanating from terrorism, illegal immigration, and cyberattacks will drive Canada's homeland security expenditure. Canada's aim to reinforce its land and maritime borders will cause spending to post a forecast-period CAGR of 2.64% to reach US\$739.5 million in 2021. According to the government's Economic Action Plan 2015, a public safety broadband network was set up for an investment of US\$2.2 million to support the police.

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 Canadian defense and security market.

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

Industry Benchmarking - Benchmark how the Canadian 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 - Detailed overview and product offerings of the leading defense and security players in Canada.

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 Canadian defense and security industry compared to other North 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 Canadian defense and security industry and their overview and product portfolio?

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

What are the Canadian 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 Canadian defense and security industry?

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