

Colombia - Defense and Security: Increased spending driven by domestic discord (Strategy, Performance and Risk Analysis)

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Abstracts

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SUMMARY

The aircraft category remains one of the key segments for Colombian defense and security with capital expenditure accounting for 66.9% of the total in 2016. This was followed by C4ISR Electronics & IT segment accounting for 3.6% of the total.

Colombia's total defense expenditure recorded a CAGR of 7.3%, rising from US\$6.1 billion in 2012 to US\$8.1 billion in 2016. It will post a forecast-period CAGR of 5.1% to reach US\$10,323.5 million in 2021 due to mounting threats from Venezuela and rebel groups.

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

Colombia undertakes various procurement and modernization initiatives:

Aircraft and naval ships currently used by Colombia's armed forces are aging. In order

to compete with their regional rivals in terms of technology and defense capabilities, the Colombian Ministry of Defense (MoD) is undertaking plans to modernize aging hardware and procure state-of-the-art weaponry and defense systems. The government has initiated several procurement programs, including multirole aircraft, transporters and MBTs.

Budget cuts impacted the country's imports industry:

Colombia's total expenditure on imports declined at a CAGR of 63.4%, from US\$207.0 million in 2012 to US\$29 million in 2016. The decline is primarily due to defense budget cuts on the back of economic deceleration and a peace accord between the government and FARC. During 2012-2015, imports grew briskly as a result of a continued increase in the import of military aircraft. Colombia also imports ships, sensors, missiles and engines.

Strong influence of anti-state elements within the military:

The Colombian MoD recently acknowledged that cocaine smugglers and leftist rebels had infiltrated senior levels of the Colombian Army, impeding efforts to defeat guerrilla organizations and combat the drug trade. The army discovered classified military information in the computer files of guerrillas from the FARC rebel group, which led the MoD to believe that senior military officials may be sharing information in exchange for bribes.

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 Colombian defense and security market.

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

Industry Benchmarking - Benchmark how the Colombian 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 Colombia.

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 Colombia 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 Colombian defense and security industry and their overview and product portfolio?

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

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

What are the recent developments in the Colombian defense and security industry?

Contents

Conflict & Costs Index
Industry Snapshot
Industry View
Industry SWOT Analysis
Industry Benchmarking
Industry Performance
Competitive Landscape
Innovation
Deals
Key Developments
Appendix

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