

# Defense Spending Global Industry Guide 2015-2024

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## Abstracts

Defense Spending Global Industry Guide 2015-2024

### SUMMARY

Global Defense Spending industry profile provides top-line qualitative and quantitative summary information including: market share, market size (value and volume 2015-19, and forecast to 2024). The profile also contains descriptions of the leading players including key financial metrics and analysis of competitive pressures within the market.

### KEY HIGHLIGHTS

Defense spending covers capital items, military personnel, government defense agencies, and related expenditure on defense and peacekeeping. The value of the market is taken to include both current and capital expenditure on the armed forces, including funding contributions to peacekeeping forces, such as the United Nations Peacekeeping Forces, defense ministries and other government agencies engaged in defense projects, paramilitary forces (when judged to be trained and equipped for military operations) and military space activities. Expenditure on personnel (including salaries and social services of both military and civil personnel, and retirement pensions of military personnel), procurement, research and development, infrastructure spending, military aid (taken as expenditure by the donor country) and general operations and maintenance are also included. Note that current expenditure on previous military activity such as veterans' benefits, weapon destruction, demobilization, and defense conversion are all excluded, as is expenditure on civil defense.

Values are segmented by the proportion of the market attributable to the army, navy and air force, with any other expenditures contained under 'other'.

The volume of the market measures the number of active serving personnel in the national army, air force, navy (including marines and coast guard) and other elements of the service, such as Joint Staff.

Any currency conversions used in the creation of this report have been calculated using constant 2019 annual average exchange rates.

The global defense spending market had a total budget allocation of \$1,778,048.8m in 2019, representing a compound annual growth rate (CAGR) of 4.1% between 2015 and 2019.

Market volumes declined with a compound annual rate of change (CARC) of -1.9% between 2015 and 2019, to reach a total of 13.80 million active serving personnel in 2019.

The US is by far the largest market globally, accounting for 41.2% of its total value in 2019.

## SCOPE

Save time carrying out entry-level research by identifying the size, growth, major segments, and leading players in the global defense spending market

Use the Five Forces analysis to determine the competitive intensity and therefore attractiveness of the global defense spending market

Leading company profiles reveal details of key defense spending market players' global operations and financial performance

Add weight to presentations and pitches by understanding the future growth prospects of the global defense spending market with five year forecasts by both value and volume

## REASONS TO BUY

What was the size of the global defense spending market by value in 2019?

What will be the size of the global defense spending market in 2024?

What factors are affecting the strength of competition in the global defense spending market?

How has the market performed over the last five years?

Who are the top competitors in the global defense spending market?

## Contents

### **1 EXECUTIVE SUMMARY**

- 1.1. Market value
- 1.2. Market value forecast
- 1.3. Market volume
- 1.4. Market volume forecast
- 1.5. Category segmentation
- 1.6. Geography segmentation
- 1.7. Competitive Landscape

### **2 INTRODUCTION**

- 2.1. What is this report about?
- 2.2. Who is the target reader?
- 2.3. How to use this report
- 2.4. Definitions

### **3 GLOBAL DEFENSE SPENDING**

- 3.1. Market Overview
- 3.2. Market Data
- 3.3. Market Segmentation
- 3.4. Market outlook
- 3.5. Five forces analysis
- 3.6. Macroeconomic Indicators

### **4 DEFENSE SPENDING IN ASIA-PACIFIC**

- 4.1. Market Overview
- 4.2. Market Data
- 4.3. Market Segmentation
- 4.4. Market outlook
- 4.5. Five forces analysis

### **5 DEFENSE SPENDING IN EUROPE**

- 5.1. Market Overview

- 5.2. Market Data
- 5.3. Market Segmentation
- 5.4. Market outlook
- 5.5. Five forces analysis
- 5.6. Macroeconomic Indicators

## **6 DEFENSE SPENDING IN FRANCE**

- 6.1. Market Overview
- 6.2. Market Data
- 6.3. Market Segmentation
- 6.4. Market outlook
- 6.5. Five forces analysis
- 6.6. Macroeconomic Indicators

## **7 DEFENSE SPENDING IN GERMANY**

- 7.1. Market Overview
- 7.2. Market Data
- 7.3. Market Segmentation
- 7.4. Market outlook
- 7.5. Five forces analysis
- 7.6. Macroeconomic Indicators

## **8 DEFENSE SPENDING IN ITALY**

- 8.1. Market Overview
- 8.2. Market Data
- 8.3. Market Segmentation
- 8.4. Market outlook
- 8.5. Five forces analysis
- 8.6. Macroeconomic Indicators

## **9 DEFENSE SPENDING IN JAPAN**

- 9.1. Market Overview
- 9.2. Market Data
- 9.3. Market Segmentation
- 9.4. Market outlook

9.5. Five forces analysis

9.6. Macroeconomic Indicators

## **10 DEFENSE SPENDING IN AUSTRALIA**

10.1. Market Overview

10.2. Market Data

10.3. Market Segmentation

10.4. Market outlook

10.5. Five forces analysis

10.6. Macroeconomic Indicators

## **11 DEFENSE SPENDING IN CANADA**

11.1. Market Overview

11.2. Market Data

11.3. Market Segmentation

11.4. Market outlook

11.5. Five forces analysis

11.6. Macroeconomic Indicators

## **12 DEFENSE SPENDING IN CHINA**

12.1. Market Overview

12.2. Market Data

12.3. Market Segmentation

12.4. Market outlook

12.5. Five forces analysis

12.6. Macroeconomic Indicators

## **13 DEFENSE SPENDING IN THE NETHERLANDS**

13.1. Market Overview

13.2. Market Data

13.3. Market Segmentation

13.4. Market outlook

13.5. Five forces analysis

13.6. Macroeconomic Indicators

## **14 DEFENSE SPENDING IN SPAIN**

- 14.1. Market Overview
- 14.2. Market Data
- 14.3. Market Segmentation
- 14.4. Market outlook
- 14.5. Five forces analysis
- 14.6. Macroeconomic Indicators

## **15 DEFENSE SPENDING IN THE UNITED KINGDOM**

- 15.1. Market Overview
- 15.2. Market Data
- 15.3. Market Segmentation
- 15.4. Market outlook
- 15.5. Five forces analysis
- 15.6. Macroeconomic Indicators

## **16 DEFENSE SPENDING IN THE UNITED STATES**

- 16.1. Market Overview
- 16.2. Market Data
- 16.3. Market Segmentation
- 16.4. Market outlook
- 16.5. Five forces analysis
- 16.6. Macroeconomic Indicators

## **17 COMPANY PROFILES**

- 17.1. The Boeing Company
- 17.2. Lockheed Martin Aeronautics Company
- 17.3. BAE Systems Inc
- 17.4. AviChina Industry & Technology Co., Ltd.
- 17.5. Raytheon Co
- 17.6. Thales SA
- 17.7. Hindustan Aeronautics Ltd
- 17.8. Mitsubishi Heavy Industries, Ltd.
- 17.9. Kawasaki Heavy Industries, Ltd.
- 17.10. Airbus SE.

- 17.11. Rheinmetall AG
- 17.12. Leonardo S.p.A.
- 17.13. Safran SA
- 17.14. Naval Group
- 17.15. Krauss-Maffei Wegmann GmbH & Co KG
- 17.16. ThyssenKrupp Marine Systems GmbH
- 17.17. Fincantieri SpA
- 17.18. IHI Corporation
- 17.19. Fujitsu Limited
- 17.20. Bombardier Inc
- 17.21. General Dynamics Mission Systems Inc
- 17.22. CAE Inc.
- 17.23. China North Industries Corp
- 17.24. China South Industries Group Corp
- 17.25. China Electronics Technology Group Corporation No.8 Research Institute
- 17.26. Damen Shipyards Group
- 17.27. Indra Sistemas, S.A.
- 17.28. Navantia SA
- 17.29. Rolls-Royce Holdings Plc
- 17.30. Babcock International Group Plc
- 17.31. Cobham plc

## **18 APPENDIX**

- 18.1. Methodology
- 18.2. About MarketLine



## List Of Tables

### LIST OF TABLES

Table 1: Global defense spending market value: \$ billion, 2015–19

Table 2: Global defense spending market volume: active serving personnel, 2015–19

Table 3: Global defense spending market category segmentation: \$ billion, 2019

Table 4: Global defense spending market geography segmentation: \$ billion, 2019

Table 5: Global defense spending market value forecast: \$ billion, 2019–24

Table 6: Global defense spending market volume forecast: active serving personnel, 2019–24

Table 7: Global size of population (million), 2015–19

Table 8: Global gdp (constant 2005 prices, \$ billion), 2015–19

Table 9: Global gdp (current prices, \$ billion), 2015–19

Table 10: Global inflation, 2015–19

Table 11: Global consumer price index (absolute), 2015–19

Table 12: Global exchange rate, 2015–19

Table 13: Asia-Pacific defense spending market value: \$ billion, 2015–19

Table 14: Asia-Pacific defense spending market volume: active serving personnel, 2015–19

Table 15: Asia-Pacific defense spending market category segmentation: \$ billion, 2019

Table 16: Asia-Pacific defense spending market geography segmentation: \$ billion, 2019

Table 17: Asia-Pacific defense spending market value forecast: \$ billion, 2019–24

Table 18: Asia-Pacific defense spending market volume forecast: active serving personnel, 2019–24

Table 19: Europe defense spending market value: \$ billion, 2015–19

Table 20: Europe defense spending market volume: active serving personnel, 2015–19

Table 21: Europe defense spending market category segmentation: \$ billion, 2019

Table 22: Europe defense spending market geography segmentation: \$ billion, 2019

Table 23: Europe defense spending market value forecast: \$ billion, 2019–24

Table 24: Europe defense spending market volume forecast: active serving personnel, 2019–24

Table 25: Europe size of population (million), 2015–19

Table 26: Europe gdp (constant 2005 prices, \$ billion), 2015–19

Table 27: Europe gdp (current prices, \$ billion), 2015–19

Table 28: Europe inflation, 2015–19

Table 29: Europe consumer price index (absolute), 2015–19

Table 30: Europe exchange rate, 2015–19

Table 31: France defense spending market value: \$ billion, 2015–19

Table 32: France defense spending market volume: active serving personnel, 2015–19

Table 33: France defense spending market category segmentation: \$ billion, 2019

Table 34: France defense spending market geography segmentation: \$ billion, 2019

Table 35: France defense spending market value forecast: \$ billion, 2019–24

Table 36: France defense spending market volume forecast: active serving personnel, 2019–24

Table 37: France size of population (million), 2015–19

Table 38: France gdp (constant 2005 prices, \$ billion), 2015–19

Table 39: France gdp (current prices, \$ billion), 2015–19

Table 40: France inflation, 2015–19

Table 41: France consumer price index (absolute), 2015–19

Table 42: France exchange rate, 2015–19

Table 43: Germany defense spending market value: \$ billion, 2015–19

Table 44: Germany defense spending market volume: active serving personnel, 2015–19

Table 45: Germany defense spending market category segmentation: \$ billion, 2019

Table 46: Germany defense spending market geography segmentation: \$ billion, 2019

Table 47: Germany defense spending market value forecast: \$ billion, 2019–24

Table 48: Germany defense spending market volume forecast: active serving personnel, 2019–24

Table 49: Germany size of population (million), 2015–19

Table 50: Germany gdp (constant 2005 prices, \$ billion), 2015–19

## About

Geopolitical tensions are continuing to intensify and demand for military equipment is on the uptick, driving defense spending across the globe. The global defense spending market had a total budget allocation of \$1,717,516.4m in 2018, representing a compound annual growth rate (CAGR) of 3.6% between 2014 and 2018.

The performance of the market is forecast to accelerate, with an anticipated CAGR of 4.1% for the five-year period 2018 - 2023. The US made up 37.8% of global spending on defense in 2018; this demonstrates the power the US has over the rest of the world. US President Trump has put pressure on other members of NATO to reach 2% of GDP on defense spending.

Apart from the US, only the UK, Poland, Greece and Estonia currently meet the current NATO target of at least 2% GDP spent on defense.

In terms of spending allocation, technological advancements and digitization have led to cyber-related threats. Military strategies are aiming to integrate digital tools and technologies to manage both traditional (land, maritime and air-based) and digital-age threats.

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