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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?

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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?

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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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