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Defense Spending Global Industry Guide 2018

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Abstracts

Defense Spending Global Industry Guide 2018

SUMMARY

Global Defense Spending industry profile provides top-line qualitative and quantitative summary information including: market size (value and volume 2013-17, and forecast to 2022). The profile also contains descriptions of the leading players including key financial metrics and analysis of competitive pressures within the market.

SYNOPSIS

Essential resource for top-line data and analysis covering the global defense spending market. Includes market size and segmentation data, textual and graphical analysis of market growth trends and leading companies.

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 2016 annual average exchange rates.

The global defense spending market is expected to generate total budget allocation of $1,610.7bn in 2017, representing a compound annual growth rate (CAGR) of 2.6% between 2013 and 2017.

Market volume is forecast to decline with a CARC of -0.2% between 2013 and 2017, to reach a total of 18.7 million armed forces personnel in 2017.

Defense spending has increased in some countries, but for the most part developed economies have been neglecting their military budgets due to budget constraints. Primary drivers between 2013 and 2017 have been Russia and China, both seeking to extensively modernize military power. For the most part, the US had engaged in sequestration until 2017, when a military increase was authorized.

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

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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 2017?

What will be the size of the global defense spending market in 2022?

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

How has the market performed over the last five years?

What are the main segments that make up the global defense spending market?

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About

Global defense spending market has grown moderately between 2013 and 2017, as countries such as Russia and China's increasing spending more than offset retrenchment in Europe and the US. The market is expected to accelerate toward 2022 as regional instability continues to deteriorate.

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Global defense spending market is expected to generate a total budget allocation of $1,610.7bn in 2017, representing a compound annual growth rate (CAGR) of 2.6% between 2013 and 2017. In comparison, the Asia-Pacific market will increase with a CAGR of 7.2%, and the US market will decline with a CAGR of -1%, over the same period, to reach respective values of $468.0bn and $613.7bn in 2017.

The Trump administration has committed to spending more and has publicly rebuked its NATO partners for failing to meet the two percent of GDP target, prompting many to begin to increase spending. Major regional powers such as Saudi Arabia, Russia, and China are all increasing spending, prompting similar reactions in neighboring countries. Eastern Europe, the middle East, and the South China Sea are potential flashpoints for conflict in the forecast period.

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