

# France - Defense and Security: Self-reliant industry spending to increase military prowess (Strategy, Performance and Risk Analysis)

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## Abstracts

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### SUMMARY

The others category remains one of the key drivers of the French defense and security industry, accounting for 32.5% of capital expenditure in 2016; followed by the aircrafts category with 23.5%. The country's total defense expenditure stood at US\$38.0 billion in 2016 and will post a forecast-period CAGR of 1.3% to reach US\$39.2 billion in 2021. The spending increase will be due to government efforts towards strengthening the combat readiness of its military forces in the wake of terror attacks in the country's capital. It also aims to upgrade its military hardware and replace aging fleets through a series of procurement programs.

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

France has a strong domestic defense industry:

France has one of the strongest defense industries in the world and satisfies the majority of its military requirements on its own. It competes with the US, the UK, Russia and China in the development of advanced military hardware. The highly competent sector consists of Thales, Safran, and Dassault Aviation; companies with an international market presence. The country's defense exports recorded a review-period CAGR of 21.16% and will continue to grow thanks to deals signed with India and Australia for fighter aircraft and submarines. Although France is self-sufficient, it does import some advanced technology platforms such as sensors, engines and transport aircraft from the US.

Expenditure on homeland security to increase:

Expenditure on homeland security increased at a rate of 1.8%, from US\$19.6 billion in 2015 to US\$20.0 billion in 2016. It will post a forecast-period CAGR of 1.12% to reach US\$21.2 billion in 2021. Terrorist attacks and cybercrime have driven the government to increase its expenditure on homeland security.

France consolidating its position as a major defense exporter:

Exports of military equipment registered a CAGR of 21.16%, rising from US\$1.0 billion in 2012 to US\$2.2 billion in 2016. The majority of exports are for aircraft, ships, and missile defense systems. Demand will emanate from the Asia-Pacific region over the forecast period.

## 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 French defense and security market.

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

Industry Benchmarking - Benchmark how the French 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 France.

## **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 French defense and security industry compared to other European 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 French defense and security industry and their overview and product portfolio?

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

What are the French 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 French defense and security industry?

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