

Germany - Defense and Security: A self-reliant industry (Strategy, Performance and Risk Analysis)

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Abstracts

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SUMMARY

The aircraft category remains one of the key growth drivers of the German defense and security industry, accounting for 27.0% of capital expenditure in 2016; followed by the others category with 25.4%. Recent budget cuts to reduce the country's fiscal deficit resulted in a decline in defense spending at a CAGR of -1.8%, from US\$41.0 billion in 2012 to US\$38.0 billion in 2016. However, due to planned government initiatives to modernize its arsenal, the budget will post a forecast-period CAGR of 1.3% to reach US\$39.2 billion in 2021.

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

Germany initiated various procurement and modernization initiatives:

Germany initiated a soldier modernization initiative called Future Soldier System (Infanterist der Zukunft) to provide its defense personnel with advanced training

equipment. Its aircraft and rotorcraft fleets are aging and the MoD aims to modernize these platforms through the procurement of state-of-the-art hardware. Modernization programs include NH90 Tactical Transport Helicopters and Sea Lion variants for the NATO Frigate Helicopter (NFH) and Puma IFV projects.

Country's imports declined due to strong domestic output:

Imports fell at a CAGR of -29.9%, from US\$157.0 million in 2012 to US\$38.0 million in 2016, owing to a decline in imports from the US and the ability of domestic companies to meet military requirements. Germany imported 28.7% of its defense equipment from the US during 2011-2015, followed by 16.1% from Switzerland, 14% from the Netherlands, and 13.7% from France; imports from the US declined by 93.5% in 2015.

The country aims to develop strategic associations with other European countries:

In a bid to reduce its dependence on imports, the government is set to develop its domestic defense industry through collaborations with the UK and France.

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 German defense and security market.

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

Industry Benchmarking - Benchmark how the German 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 Germany.

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 German 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 German defense and security industry and their overview and product portfolio?

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

What are the German 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 German defense and security industry?

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