

India - Defense and Security: Modernization drives the high growth potential market (Strategy, Performance and Risk Analysis)

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Abstracts

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SUMMARY

The aircraft category is a key growth driver of the Indian defense and security industry, accounting for 28.6% of capital expenditure in 2016; followed by the C4ISR electronics and IT category with 16.8%. Defense spending recorded a review-period CAGR of 3.4% to reach US\$38.9 billion in 2016 and will post a forecast-period CAGR of 6.6% to reach US\$55.4 billion in 2021, primarily driven by government initiatives to modernize the defense sector by adopting advanced technology and developing its domestic military hardware manufacturing capabilities.

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

India's defense imports declined:

India, the world's largest arms importer, acquired ammunition worth US\$2.5 billion in

2016; in 2013, the value was US\$5.2 billion. Imports have since declined and will post a forecast-period CAGR of 13.05%. In part the decline will be caused by India's ambition to develop in-house capabilities under its flagship Make in India initiative.

India maintains strong international relations:

Russia has been the main source of India's defense imports and 2014 Prime Minister Narendra Modi signed deals worth billions of dollars when President Putin visited India. India is diversifying its imports by focusing on agreements with Israel, the US, the UK and France and signed a US\$3 billion with Boeing to purchase Chinook and Apache helicopters. The DRDO is also collaborating with Israel Aerospace Industries to develop a Barak 8 Anti-Missile Defense system.

India's spending on homeland security to increase:

In 2016, the budget for homeland security increased by 11.11%, from US\$9.9 billion in 2015 to US\$11.0 billion in 2016. It will post a forecast-period CAGR of 6.15% to reach US\$15.9 billion in 2021, owing to the threat of cross border terrorism, insurgencies in the form of separatists in Jammu and Kashmir, and left wing extremists. To counter these threats, the government will invest in surveillance and monitoring equipment, global positioning systems, radars and biometric systems.

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 Indian defense and security market.

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

Industry Benchmarking - Benchmark how the Indian 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 India.

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 India defense and security industry compared to other Asian 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 Indian defense and security industry and their overview and product portfolio?

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

What are the Indian 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 Indian defense and security industry?

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