

Italy - Defense and Security: Internal violence challenging national security (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 Italian defense and security industry, accounting for 24.2% of capital expenditure in 2016; followed by the C4ISR electronics and IT category with 21.0%. The country's defense budget fell from US\$18.1 billion in 2012 to US\$15.4 billion in 2016, representative of a CAGR of -3.9%. It was adversely affected by the European debt crisis and a subsequent decline in GDP. However, it will reach US\$16.5 billion in 2021, accelerating at a CAGR of 2.7%. The increase is due to efforts to replace aging military hardware and establish better defense mechanisms against mafia violence.

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

Italy reported a growth in its defense exports:

An increase in exports is indicative of a growth in the demand for Italian arms. Defense exports from Italy rose from US\$692 million in 2015 to US\$802 million in 2016, representative of an annual growth rate of 15.9%. Major defense contractors include Leonardo-Finmeccanica, Fincantieri, and Selex. Asian and Middle Eastern countries are the main markets for Italian defense exports, of which India, the UAE and Turkey account for a considerable proportion. As most of the European countries are on the way to building robust defense infrastructure to fight terrorism, Italian aircraft, ships, naval weapons, sensors and missiles are likely to be in demand.

Homeland security expenses to grow with the rise in illegal immigration:

Italy's homeland security expenditure declined at a CAGR of -2.7%, from US\$7.5 billion in 2012 to US\$6.8 billion in 2016 due to budget cuts. Over the forecast period, the budget will post a CAGR of 1%, to reach US\$7.0 billion in 2021 due to concerns related to terrorism, cybersecurity, illegal immigration and mafia activities. On a cumulative basis, the country is expected to spend US\$33.9 billion on homeland security over the forecast period.

Revenue expenditure to decline:

Italy reported revenue expenditure of US\$15.6 billion in 2012, which declined to US\$13.3 billion in 2016 at a CAGR of -3.8%. Over the forecast period, training programs for army officials and infrastructure maintenance activities will lead to a forecast-period CAGR of 2.7% and expenditure of US\$14.1 billion in 2021. The government's focus on procurement programs will enable the share of capital expenditure to increase, leading to fall in the share of revenue expenditure, from 86.2% in 2016 to 85.4% in 2021.

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 Italian defense and security market.

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

Industry Benchmarking - Benchmark how the Italian 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 Italy.

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 Italy 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 Italian defense and security industry and their overview and product portfolio?

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

What are the Italian 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 Italian defense and security industry?

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