

Japan - Defense and Security: Territorial conflicts and modernization to drive expenditure (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 Japanese defense and security industry, accounting for 48.0% of capital expenditure in 2016; followed by the C4ISR electronics and IT category with 15.2%. The country's defense expenditure recorded a CAGR of -8.3%, falling from US\$59.1 billion in 2012 to US\$41.6 billion in 2016. However, due to the procurement of defense equipment, and security concerns propelled by ongoing territorial disputes with China and Russia, expenditure will reach US\$45.7 billion in 2021, representative of a forecast-period CAGR of 1.7%.

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

Japan has strong military ties with other countries:

A strong military relationship with other countries enables Japan to procure advanced

weaponry. It has solid defense relations with the US; the two countries having signed a treaty to assist each other in defense capability developments on January 19, 1960. In fact, the US accounts for 90% of Japan's total defense imports. Aside from the US, Japan has agreements with the Philippines and Vietnam and is in the process of extending defense equipment cooperation agreements with the UK, France, and Australia.

Japan has a modest defense budget compared to China and India:

Japan's defense expenditure recorded a CAGR of -8.0%, falling from US\$51.1 billion in 2012 to US\$41.7 billion in 2016 in sharp contrast with China and India which registered respective CAGRs of 9.0% and 5.0% to reach US\$146.3 billion and US\$45.7 billion in 2016. Japan allocated an average of 1.0% of its GDP to defense during 2012-2016, with its primary focus being social development and structural reforms.

Defense import expenditure to increase due to aircraft procurements:

Total import expenditure increased at a CAGR of 7.8%, from US\$244.0 million in 2012 to US\$330.0 million in 2016, due to the import of missile defense and C4ISR systems from US companies. The government signed a contract with Lockheed Martin for 42 JSFs, driving the country's import expenditure.

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 Japanese defense and security market.

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

Industry Benchmarking - Benchmark how the Japanese 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 Japan.

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

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

What are the Japanese 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 Japanese defense and security industry?

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