

Saudi Arabia - Defense and Security: Modernization to drive expenditure (Strategy, Performance and Risk Analysis)

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Abstracts

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SUMMARY

In terms of the level of conflict, Saudi Arabia was ranked 12th globally as it faces protests in Riyadh, terror plots from IS, and a perceived nuclear threat from Iran. Saudi Arabia ranked highest in terms of regional militarization and sixth globally due to the government's escalating modernization efforts. It ranked 18th globally in terms of societal safety and security, and 12th in terms of domestic and international conflict.

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

Saudi Arabia's defense industry revenue and capital expenditure to grow:

Saudi Arabia's revenue expenditure stood at US\$25.5 billion in 2016, and will post a forecast-period CAGR of 15.5% to reach US\$56.8 billion in 2021. Modernization programs, the United States Military Training Mission to Saudi Arabia, and the

construction of military prep schools will drive this growth. Saudi Arabia's capital expenditure stood at US\$20.3 billion in 2016, and will post a forecast-period CAGR of 14.0% to reach US\$42.3 billion in 2021 due to the procurement of aircraft, C4ISR, and advanced weapon systems. The country's total defense expenditure stood at US\$45.8 billion in 2016, and will post a forecast-period CAGR of 14.9% to reach US\$99.1 billion in 2021 due to the procurement of advanced military systems as a part of modernization efforts owing to the threats emanating from instability in Syria, Iraq, and Yemen.

Homeland security to drive capital expenditure:

Homeland security capital expenditure stood at US\$6.6 billion in 2016 and will post a forecast-period CAGR of 3.1% to reach US\$7.8 billion in 2021. Growth will be driven by investments in high-tech border fencing along boundaries with Iraq and Yemen to protect oil infrastructure, and combat human trafficking.

Strong ties with US and UK:

Strong military ties with US and UK provide Saudi Arabia with access to advanced military technology. In 2015, the US and Saudi Arabia signed a US\$1.3 billion deal to develop a large consignment of air-ground munitions and spares. The deal includes the delivery of GBU-10 Paveway II Laser Guided Bombs, BLU-117/MK-84 2000lb General Purpose Bombs, and GBU-12 Paveway II LGBs. Saudi Arabia continued to expand its fleet of F-15 fighters and invested in modernizing their remaining fleet to F15SA standards. The country will also procure Typhoons from the UK.

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 Saudi Arabian defense and security market.

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

Industry Benchmarking - Benchmark how the Saudi Arabian 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 - Analyze and compare the performance of the leading players in the Saudi Arabian defense and security market by business segment on metrics such as arms sales, along with detailed overview and product offerings of the leading defense and security players in Saudi Arabia.

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 Saudi Arabian defense and security industry compared to other Middle East and African countries?

What is driving the performance of key industry segments such as Homeland Security, aircraft, and others?

Who are the leading players in the Saudi Arabian defense and security industry and how does their performance compare?

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

What are the Saudi Arabian defense and security industry's Strengths and Weaknesses and what Opportunities and Threats does it face?

What are the recent developments, innovations and deals in the Saudi Arabian defense and security industry?

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