

South Africa - Defense and Security: Security threats to drive modernization efforts (Strategy, Performance and Risk Analysis)

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Abstracts

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SUMMARY

South Africa ranked seventh globally with the lowest level of conflict in the entire Middle East and Africa region and fares better in terms of societal safety and security than most countries in Middle East and Africa. The South African rank (in level of conflict) can be attributed to the involvement of troops in global peacekeeping operations and the global war against terror. Some of the key factors that have contributed towards the increase in terrorism threat in the country are its strong economy and collaborations with the west.

KEY HIGHLIGHTS

South Africa's defense industry revenue and capital expenditure to grow:

South Africa's defense expenditure declined at CAGR of -2.5%, from US\$4.6 billion in 2012 to US\$4.1 billion in 2016. It will post a forecast-period CAGR of 1.8% to reach US\$4.6 billion in 2021. The country is an active participant peacekeeping operations governed by the United Nations, African Union, and the Southern African Development Community.

Homeland security to drive capital expenditure:

South Africa's capital expenditure on homeland security increased at a rate of 6.3%, from US\$9.6 billion in 2015 to US\$10.2 billion in 2016 and will post a forecast-period CAGR of 5.1% to reach US\$13.3 billion in 2021. This increase in expenditure will be directed towards combating terrorism, border protection, cybersecurity, and maritime protection. The country will procure CCTV and biometric identification systems.

Strong ties driving procurements:

South Africa's strong relations with Sweden, Russia, and the US helps to it procure advanced technology. Sweden is the main supplier of arms to South Africa with a share of 77.6%, while Russia and the US were the second and third-largest suppliers with respective shares of 8.7% and 6.6%. Some of the country's major imports include aircraft, engines, satellites, missiles, and sensors.

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 South Africa defense and security market.

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

Industry Benchmarking - Benchmark how the South Africa 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 South Africa 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 South Africa.

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 South African 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 South African defense and security industry and how does their performance compare?

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

What are the South African 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 South African defense and security industry?

Contents

Conflict & Costs Index
Industry Snapshot
Industry View
Industry SWOT Analysis
Industry Benchmarking
Industry Performance
Competitive Landscape
Innovation
Deals
Key Developments
Appendix

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