

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

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Abstracts

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SUMMARY

South Korea was ranked 23rd globally in terms of the economic impact of violence and due to relatively high military expenditure, ranked 10th globally on this parameter. The country is modernizing its armed forces as a means to effectively combat external security threats from the North. To prevent possible terror attacks, the military and law enforcement agencies are working closely with the US Forces Korea (USFK), a US military base in South Korea.

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

South Korean revenue and capital expenditure to grow:

South Korean revenue expenditure stood at US\$22.9 billion in 2016, and will post a forecast-period CAGR of 4.5% to reach US\$28.2 billion in 2021. An increasing focus on

joint military exercises, troop training, institutional education, construction, and maintenance will support such growth. Capital expenditure stood at US\$10.4 billion in 2016, and will post a forecast-period CAGR of 6.2% to reach US\$12.9 billion in 2021 due to an increase in arms procurements. The South Korean Ministry of National Defense (MND) plans to purchase multipurpose commercial satellites and high-altitude spy drones. The country's defense budget stood at US\$33.3 billion in 2016, and will post a forecast-period CAGR of 5.0% to reach US\$41.2 billion in 2021.

Homeland security segment drove capital expenditure:

South Korea's homeland security capital expenditure stood at US\$1.2 billion in 2016, and will post a forecast-period CAGR of 4.5% to reach US\$1.5 billion in 2021. Maritime, border and critical infrastructure protection are the main contributors; maritime and border security will reach US\$471.0 million by 2021.

Strong military ties:

South Korea has strong military ties with the US; their relationship being a decisive factor in procurement strategies - being South Korea's largest arms supplier, the US accounted for 59.5% of the country's total arms imports during 2012-2016. Other significant arms suppliers include Germany, Israel, the UK, and Sweden. The country has also developed supplier relations with France and the Netherlands as it continues to diversify its defense procurements.

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 South Korean defense and security market.

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

Industry Benchmarking - Benchmark how the South Korean 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 Korean 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 Korea.

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 Korean defense and security industry compared to other Asia Pacific 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 Korean defense and security industry and how does their performance compare?

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

What are the South Korean 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 Korean defense and security industry?

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