

Switzerland - Defense and Security: Growth in expenditure to be driven by modernization programs (Strategy, Performance and Risk Analysis)

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Abstracts

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SUMMARY

Switzerland is the most peaceful nation in Europe, ranking 48th in terms of level of conflict and 53rd in terms of societal safety and security. This is mainly due to the country's stance of armed neutrality. Switzerland is ranked 50th in terms of its economic impact of violence score, 46th in terms of its business costs of terrorism score, and 48th in terms of its business costs of crime and violence score, due to the country's neutrality. Switzerland allotted only 0.71% of its GDP towards its defense expenditure in 2016, considerably lower than many European countries.

MarketLine's Premium industry reports provide a comprehensive market view, including sections on: key industry trends and drivers, industry SWOT analysis, industry benchmarking to compare key performance indicators with regional and global markets, competitive landscape, and innovation.

KEY HIGHLIGHTS

Increasing revenue and capital expenditure:

Swiss capital expenditure increased at a CAGR of 1.5% over the historic period, from US\$1,471.1 million in 2012 to US\$1,562.1 million in 2016. This value is expected to increase at a CAGR of 1.8% over 2017-2021 to reach US\$1,716.4 million. The increase

in expenditure will primarily be due to an increase in the procurement of arms as part of the government's modernization initiatives. Swiss revenue expenditure increased at a CAGR of 1.3% over the historic period, from US\$3,228.9 million in 2012 to US\$3,397.1 million in 2016. This is expected to increase further at a CAGR of 1.1% over 2017-2021 to reach US\$3,590.8 million, mainly due to an increase in training and construction costs.

Aircraft segment leads in terms of capital expenditure:

Swiss capital expenditure on the aircraft segment was the highest among the other defense segments, registering US\$1,418.7 million in 2016. However, expenditure on this segment is expected to witness a CAGR of -8.8% over 2017-2021 to reach US\$903.9 million. The decrease in expenditure is attributed to the negative result of the referendum which was undertaken in 2014 in regards to the procurement of 22 Saab Gripen.

Active participation in peacekeeping missions:

Due to Switzerland's association with the UN, the Organization for Security and Cooperation in Europe (OSCE), and NATO, the country contributes civil and military personnel to peace-keeping operations. The country is involved in the Human Security Network, the Small Arms Survey, economic development through the prevention of armed violence, and the UN resolution on justice in transition processes. Swiss military personnel are currently deployed on crisis management missions in support of the UN Stabilization Mission in the Democratic Republic of the Congo, Liberia, and Sudan.

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 Switzerland defense and security market.

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

Industry Benchmarking - Benchmark how the Switzerland 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 Switzerland 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 the Switzerland.

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 Swiss defense and security industry compared to other European countries?

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

Who are the leading players in the Switzerland's defense and security industry and how does their performance compare?

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

What are the Switzerland's 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 Swiss defense and security industry?

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