

United Kingdom - Defense and Security: Modernization and procurement to drive expenditure (Strategy, Performance and Risk Analysis)

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Abstracts

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SUMMARY

The UK's total defense expenditure witnessed a CAGR of -2.8% during the historic period, from US\$60.0 billion in 2012 to US\$53.5 billion in 2016, owing to government initiatives to reduce the country's fiscal deficit and the removal of troops from Afghanistan. However, it is expected to grow at a CAGR of 4.3% over the forecast period, from US\$55.0 billion in 2017 to US\$65.2 billion in 2021, due to the government's procurement plans.

The aircraft category remains one of the UK's key segments in terms of defense and security, with capital expenditure on aircraft accounting for 43.1% of total capital expenditure in 2016. The C4ISR electronics & IT segment accounted for 40.8% of the total in 2016.

Market Line'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

Revenue expenditure to account for the majority of total defense expenditure:

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During the historic period, the share of revenue expenditure as a percentage of total defense spending increased from 77.1% in 2012 to 79.1% in 2016, with the remainder spent on the procurement of equipment and services. The implementation of budget cuts and reform measures are unlikely to affect the UK's revenue expenditure over the forecast period. Therefore, the share of capital expenditure is expected to remain at an average of 21.1%, while revenue expenditure would account for the remaining total defense expenditure.

UK undertakes various peacekeeping missions:

The UK's armed forces are actively involved in a number of peacekeeping operations. The country has deployed troops to the UN Organization Stabilization Mission in the Democratic Republic of Congo, the UN Peacekeeping Force in Cyprus, the UN Multidimensional Integrated Stabilization Mission in Mali), and the UN Mission in Sudan. Participating in peacekeeping missions gives UK the advantage of being able to establish army bases in various countries. As it stands, the UK has deployed forces to Afghanistan, Africa, Baltics states, Belize, Brunei, Canada, Cyprus, Germany, Gibraltar, Iraq and South Atlantic Islands.

The country is making efforts to strengthen its domestic defense industry:

Armed force modernization plans with smaller budgets are driving procurements from domestic firms. The UK's defense industry comprises a range of advanced technologies and products with proven capabilities. It is also home to BAE Systems, Rolls-Royce and Babcock International Group. A numbers of UK-based firms have entered into joint development programs to enhance their competencies and capabilities.

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 UK defense and security market.

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

Industry Benchmarking - Benchmark how the UK 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 UK.

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 UK defense and security industry compared to other European 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 UK defense and security industry and their overview and product portfolio?

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

What are the UK 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 UK 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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