

# **United States - Defense and Security: Leading spending for military supremacy (Strategy, Performance and Risk Analysis)**

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## **Abstracts**

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### **SUMMARY**

The US ranks 17th globally in terms of level of conflict and third in terms militarization. The US's involvement in the armed conflict against Islamic State, including several airstrikes on IS-held territory, drastically increased the country's international conflict score. The US ranks ninth in terms of economic impact and violence, seventh in terms of military expenditure (% of GDP), 14th in terms of the costs of terrorism and 20th in terms of the business costs of crime and violence.

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**

Declining revenue and capital expenditure is expected to change over the forecast period:

Capital expenditure in the US witnessed a CAGR of -5.2% over the historic period, from US\$227.2 billion in 2012 to US\$183.5 billion in 2016. However, the country's capital expenditure is expected to increase at a CAGR of 2.8% over 2017-2021 to reach

US\$198.7 billion. This increase is mainly due to the country's focus on replacing the damaged and obsolete defense equipment used in the Iran and Afghan wars. Similarly, the country's revenue expenditure observed a CAGR of -5.2% over the historic period, from US\$418.2 billion in 2012 to US\$338.1 billion in 2016. This decline was primarily due to sequestration measures imposed by the government. However, it is expected to increase at a CAGR of 2.8% over 2017-2021 to reach US\$386.4 billion. This growth is primarily due to the country's increased spending on training activities and its efforts towards maintaining military superiority.

The US's total defense expenditure posted a CAGR of -2.6% over the historic period, from US\$645.5 billion in 2012 to US\$580.3 billion in 2016, but is expected to increase at a CAGR of 0.7% over 2017-2021 to reach US\$599.4 billion.

Aircraft and C4ISR electronics & IT segments led in terms of capital expenditure:

In terms of the different defense segments, aircraft and C4ISR electronics & IT led in terms of capital expenditure, registering US\$82.0 billion and US\$54.9 billion respectively in 2016. Aircraft expenditure in the US stood at US\$81.9 billion in 2016 and is forecast to increase at a CAGR of 2.7% over 2017-2021 to reach US\$91.4 billion. This growth is primarily driven by the replacement of aging aircraft, equipment and technological innovations in the industry.

C4ISR electronics & IT expenditure stood at US\$54,945.5 million in 2016 and is expected to witness a CAGR of -0.5% over 2017-2021 to reach US\$55,845.9 million. However, the DoD's (Department of Defense) aim to develop next generation C4ISR technologies such as AESA, hi-tech radars, cloaking technology, un-jammable imaging systems, and Video Synthetic Aperture Radar (ViSAR) will maintain C4ISR segment expenditure.

Strong tie-ups with overseas countries:

Even though the US has a highly advanced military industrial base, making it a high military hardware exporter, it imports arms in order to build strategic relations with countries such as the UK, Germany, Canada, and Norway. The country imports military hardware primarily from European countries. Germany is the largest supplier of arms to the US, followed by the UK and Canada. The US and the UK have also built strong military relations through mutual cooperation, such as the joint operation of the British Armed Forces and the US Armed Forces in Operation Iraqi Freedom.

## 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 US defense and security market.

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

Industry Benchmarking - Benchmark how the US 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 US 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 US.

## 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 US defense and security industry compared to other North American countries?

What is driving the performance of key industry segments such as C4ISR Electronics & IT, aircraft, and others?

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

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

What are the US 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 US defense and security industry?

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