

FDI Opportunities in the Indian Defense Sector, Policy Overview, Technological Capability Assessment (Airborne, Naval, and Land), Inventory Gap Assessment (Airborne, Naval, and Land), Key Indian Companies – Capabilities, Tie-ups and Profiles

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Abstracts

India's high defense spending makes it an attractive destination for foreign direct investment (FDI)

The Indian aerospace and defense market presents an attractive and significant opportunity for domestic players and foreign companies across the defense supply chain. India has the third-largest armed forces in the world, and its defense budget is nearly 2% of its GDP. It is one of the largest importers of conventional defense equipment and spends about 40% of its total defense budget on capital acquisitions. The majority of the country's defense requirements are met through imports.

Make in India initiative expected to bolster opportunities for the Indian companies looking to enter the defense sector

The Indian government aims to build a domestic industrial base by encouraging procurement of indigenously manufactured or developed technology and weapons systems, under its Make in India initiative. It has also revised the Defense Procurement Procedure (DPP). Original equipment manufacturers and their suppliers are expected to fulfil offset obligations and take advantage of India's competitive advantages in manufacturing and information technology by setting up manufacturing facilities in the country. A large number of Indian private companies and publicly funded research laboratories are looking to enter the Indian defense sector.

Break-up of primary participants for the report has been given below:

By company: Tier1 - 35%, Tier 2 - 45%, Tier 3 - 20%

BY designation: C Level - 35%, Director Level - 25%, Others - 40%

Opportunities for domestic players to emerge as offset partners for the foreign players

The offset policies formulated by the Indian government are expected to offer various opportunities for the domestic private players. They are expected to help develop the required ecosystem for major private players to emerge. This has led to various opportunities which are anticipated to spur the growth of the indigenous defense industry, including the private sector.

The domestic companies, specially medium, small, and micro enterprises (MSMEs) are expected to be a part of the global supply chain of major defense companies.

The various companies profiled in this report include Ashok Leyland, Astra Microwave Products, Bharat Forge, Larsen&Toubro, Mahindra & Mahindra, Reliance Infrastructure, Reliance Industries, Rolta India, Solar Industries, TATA Group, Walchandnagar Industries, Bharat Dynamics, Bharat Earth Movers, Bharat Electronics, Cochin Shipyard, Garden Reach Shipbuilding & Engineers, Hindustan Aeronautics, Hindustan Shipyard, Mazagaon Dock Shipyard, and Zen Technologies.

Reasons to Buy the Report:

From an insight perspective, this research report has focused on various levels of analysis—inventory assessment, mapping the technological capability roadmap as envisaged by the Indian government, market structure analysis of top players, and company profiles, which together comprise and discuss the basic views on the competitive landscape and opportunities in the Indian defense sector.

The report provides insights on the following pointers:

Market Penetration: Comprehensive information on weapons systems and components offered by the top players in the Indian defense sector

Product Development/Innovation: Insights related to the current inventory held

by the Indian armed forces and expected procurements

Market Development: Information about the changing market dynamics due to relaxing of FDI norms

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