

World Defense Budget Analysis by Allocation Type (Military Expense and Admin Expense), Departmental Allocation, Platform Allocation, System Allocation, Domain Allocation, Technology Allocation and Sales Allocation and Region - Global Forecast to 2028

<https://marketpublishers.com/r/WDC52F7F8C5AEN.html>

Date: July 2023

Pages: 510

Price: US\$ 4,950.00 (Single User License)

ID: WDC52F7F8C5AEN

Abstracts

The world defense budget is estimated to be USD 2,004.7 billion in 2023 and is expected to reach USD 2,546.9 billion by 2028 at a CAGR of 4.9% from 2023 to 2028. Maintaining a modern and well-equipped military force is a critical factor driving the rise in defense budget allocation. Many countries face the challenge of outdated equipment, aging infrastructure, and the need to replace or upgrade existing assets. To ensure military readiness and effectiveness, defense budgets are directed toward the acquisition of new platforms, equipment, and technologies. This includes investments in next-generation fighter jets, naval vessels, intelligence systems, cyber defense capabilities, and personnel training. Modernization efforts aim to address capability gaps, enhance operational effectiveness, and adapt to evolving threats, leading to increased defense expenditures.

The cyber subsegment is projected to witness the highest CAGR during the forecast period.

The cyber platform is projected to grow at the highest CAGR; with the increasing reliance on digital systems and the growing threat landscape in cyberspace, governments worldwide recognize cybersecurity's critical importance and are allocating significant resources to bolster their cyber defense capabilities. The cyber platform encompasses investments in technologies, infrastructure, and personnel training related to cybersecurity. As cyber threats become more sophisticated and pervasive, there is a pressing need to strengthen defense mechanisms, develop advanced cybersecurity

tools, and enhance the resilience of critical infrastructure against cyber-attacks.

The military expense subsegment is projected to dominate the world defense budget analysis by allocation type.

In the forecast period, the military expense subsegment is anticipated to have the largest market share within the defense budget allocation market. Military expenses include personnel salaries, training, operations, equipment procurement, research and development, maintenance, and modernization of military assets. Several factors contribute to the dominance of the military expense subsegment. Firstly, maintaining a capable and well-equipped military force is a top priority for governments worldwide to ensure national security and defense preparedness. This requires significant investments in personnel, training, and the acquisition of advanced weaponry and technology.

North America is expected to account for the largest market share in 2023

North America is poised to capture the largest market share in the defense budget allocation, driven by several influential factors. Foremost among these factors is the significant defense budget of the United States, which consistently ranks as the world's highest defense spender. The United States allocates substantial resources to maintain its military readiness, global military presence, and technological advancements. As a result, its defense spending contributes significantly to the overall market share in North America. Moreover, North America boasts a thriving defense industry and is a hub for cutting-edge technology development. The region hosts renowned defense contractors, research institutions, and aerospace companies, fostering innovation and driving defense spending. This advanced industry ecosystem enables North America to remain at the forefront of defense technologies, further solidifying its market dominance.

The break-up of the profile of primary participants in the World defense budget analysis:

By Company Type: Tier 1 – 40%, Tier 2 – 30%, and Tier 3 – 30%

By Designation: C Level – 30%, Director Level – 20%, Others-50%

By Region: North America –35%, Europe – 20%, Asia Pacific – 30%, Middle East– 10%, and Latin America – 5%

Prominent countries include the US, China, India, Russia, Saudi Arabia, the UK, and France, among others.

Research Coverage:

This research report categorizes the world defense budget analysis by By Allocation Type, Departmental Allocation, Platform Allocation, System Allocation, Domain Allocation, Technology Allocation, and By Region. The scope of the report covers detailed information regarding the major factors, such as drivers, restraints, challenges, and opportunities, influencing the growth of the world defense budget analysis. A detailed analysis of the critical countries has been done to provide insights into their defense overview; key strategies; Contracts, partnerships, agreements, new mergers and acquisitions, and recent developments associated with the world defense budget analysis.

Reasons to buy this report:

Analysis of key drivers (Increasing global security threats and geopolitical tensions, modernization and upgrading of military capabilities, and technological advancements in defense systems), restraints (Budget constraints and fiscal limitations, economic downturns and recessions, and shifting geopolitical dynamics and changing priorities), opportunities (Defence market expansion in emerging economies, growing demand for cybersecurity and counterterrorism capabilities, and advancements in autonomous systems and artificial intelligence), and challenges (Uncertainty and unpredictability of global security threats, rapidly evolving nature of warfare and asymmetric threats, and balancing defense spending with other social and economic priorities) influencing the growth of world defense budget analysis.

Product Development/Innovation: Detailed insights on upcoming technologies and research & development activities in the world defense budget analysis

Market Development: Comprehensive information about lucrative markets – the report analyses the world defense budget analysis across varied regions

Market Diversification: Exhaustive information about new products & services, untapped geographies, recent developments, and investments in the world defense budget analysis

Competitive Assessment: In-depth assessment of market shares, growth

strategies, and service offerings of leading contractors in the world defense budget analysis

Contents

1 INTRODUCTION

1.1 STUDY OBJECTIVES

1.2 MARKET DEFINITION

1.3 MARKET SCOPE

1.3.1 MARKETS COVERED

FIGURE 1 WORLD DEFENSE BUDGET ANALYSIS SEGMENTATION

1.3.2 REGIONAL SCOPE

TABLE 1 WORLD DEFENSE BUDGET ANALYSIS, 2019–2022 (USD BILLION)

TABLE 2 WORLD DEFENSE BUDGET ANALYSIS, 2023–2028 (USD BILLION)

1.3.3 YEARS CONSIDERED

1.4 CURRENCY CONSIDERED

TABLE 3 USD EXCHANGE RATES

1.5 INCLUSIONS AND EXCLUSIONS

TABLE 4 INCLUSIONS AND EXCLUSIONS IN WORLD DEFENSE BUDGET ANALYSIS

1.6 LIMITATIONS

1.7 STAKEHOLDERS

2 RESEARCH METHODOLOGY

2.1 RESEARCH DATA

FIGURE 2 RESEARCH FLOW

FIGURE 3 WORLD DEFENSE BUDGET ANALYSIS: RESEARCH DESIGN

2.1.1 SECONDARY DATA

2.1.1.1 Key data from secondary sources

FIGURE 4 KEY DATA FROM SECONDARY SOURCES

2.1.2 PRIMARY DATA

2.2 MARKET SIZE ESTIMATION

2.2.1 SEGMENTS AND SUBSEGMENTS

2.2.2 EXCLUSIONS

2.3 RESEARCH APPROACH AND METHODOLOGY

2.3.1 BOTTOM-UP APPROACH

TABLE 5 MARKET ESTIMATION PROCEDURE

FIGURE 5 BOTTOM-UP APPROACH

2.3.2 TOP-DOWN APPROACH

FIGURE 6 TOP-DOWN APPROACH

2.4 MARKET BREAKDOWN AND DATA TRIANGULATION

FIGURE 7 DATA TRIANGULATION

2.5 RESEARCH LIMITATIONS

3 EXECUTIVE SUMMARY

3.1 WORLD DEFENSE BUDGET TO TRIPLE WITH USD 6 BILLION ALLOCATIONS BY 2030

3.2 OVER 50% OF WORLD DEFENSE BUDGET TO BE SPENT ON MODERNIZATION PROGRAMS BY 2025

3.3 WORLD DEFENSE BUDGET TO BE 4% OF GLOBAL GDP BY 2030

3.4 US TO CONTRIBUTE 45% TO WORLD DEFENSE BUDGET BY 2030

3.5 US, CHINA, RUSSIA, INDIA, AND SAUDI ARABIA TO CONSTITUTE MORE THAN 70% OF GLOBAL MILITARY SPENDING IN 2025

3.6 INDIA TO EMERGE AS LEADING DEFENSE EXPORTER BY 2030, WITH STRONG FOCUS ON INDIGENOUS MANUFACTURING

3.7 EUROPE TO HAVE MILITARY BURDEN OF 3% TILL 2025

3.8 WAR IN UKRAINE PROMPTED EUROPEAN COUNTRIES TO INCREASE DEFENSE SPENDING FROM USD 480 BILLION IN 2022 TO USD 650 BILLION BY 2030

3.9 DEFENSE BUDGET OF MIDDLE EAST TO GROW BY 6% YOY FROM 2025 TO 2030

3.10 AFRICA TO HOLD 5% SHARE OF WORLD DEFENSE BUDGET IN 2030

4 US DEFENSE BUDGET ANALYSIS

4.1 INTRODUCTION

FIGURE 8 US: DEFENSE BUDGET (2016–2022)

TABLE 6 US: DEFENSE BUDGET ANALYSIS, 2019–2022 (USD BILLION)

TABLE 7 US: DEFENSE BUDGET ANALYSIS, 2023–2028 (USD BILLION)

TABLE 8 US: DEFENSE BUDGET ANALYSIS, BY ALLOCATION TYPE, 2019–2022 (USD BILLION)

TABLE 9 US: DEFENSE BUDGET ANALYSIS, BY ALLOCATION TYPE, 2023–2028 (USD BILLION)

TABLE 10 US: DEFENSE BUDGET ANALYSIS, BY DOMAIN ALLOCATION, 2019–2022 (USD BILLION)

TABLE 11 US: DEFENSE BUDGET ANALYSIS, BY DOMAIN ALLOCATION, 2023–2028 (USD BILLION)

TABLE 12 US: DEFENSE BUDGET ANALYSIS, BY PLATFORM ALLOCATION,

2019–2022 (USD BILLION)

TABLE 13 US: DEFENSE BUDGET ANALYSIS, BY PLATFORM ALLOCATION,
2023–2028 (USD BILLION)

TABLE 14 US: DEFENSE BUDGET ANALYSIS, BY SYSTEM ALLOCATION,
2019–2022 (USD BILLION)

TABLE 15 US: DEFENSE BUDGET ANALYSIS, BY SYSTEM ALLOCATION,
2023–2028 (USD BILLION)

TABLE 16 US: DEFENSE BUDGET ANALYSIS, BY TECHNOLOGY ALLOCATION,
2019–2022 (USD BILLION)

TABLE 17 US: DEFENSE BUDGET ANALYSIS, BY TECHNOLOGY ALLOCATION,
2023–2028 (USD BILLION)

4.2 TRENDS/DISRUPTIONS IMPACTING CONTRACTOR BUSINESS

FIGURE 9 US: TRENDS/DISRUPTIONS IMPACTING CONTRACTOR BUSINESS

4.3 REGULATORY AND POLICY LANDSCAPE

4.4 IMPACT OF MEGATRENDS

4.5 TECHNOLOGY TRENDS

4.5.1 HYPERSONIC WEAPONS

4.5.2 INTERNET OF MILITARY THINGS

4.6 TREND INDICATORS

4.6.1 MACRO

4.6.1.1 GDP and defense budget share (%) of GDP

FIGURE 10 US: DEFENSE BUDGET AS % OF GDP (2016–2022)

4.6.1.2 Geopolitical intensity/external disputes

4.6.1.3 Development index

4.6.1.4 Terrorism index

4.6.1.5 Recession impact analysis

4.6.2 MICRO

4.6.2.1 Military strength/recruitment

4.6.2.2 Military modernization

4.6.2.3 Soldier welfare

4.7 EXPORT AND IMPORT/TRADE ANALYSIS

TABLE 18 US: EXPORT DATA (USD THOUSAND)

TABLE 19 US: IMPORT DATA (USD THOUSAND)

4.8 DEFENSE BUDGET ANALYSIS, BY DEPARTMENTAL ALLOCATION

4.8.1 MILITARY

4.8.1.1 United States Army

4.8.1.2 United States Navy

4.8.1.3 United States Air Force

4.8.1.4 United States Marine Corps

4.8.2 HOMELAND SECURITY

4.8.2.1 Transportation Security Administration

4.8.2.2 US Customs and Border Protection

4.8.2.3 US Immigration and Customs Enforcement

4.8.2.4 Federal Emergency Management Agency

4.9 DEFENSE BUDGET ANALYSIS, BY PLATFORM ALLOCATION

4.9.1 LAND

FIGURE 11 US: LAND FLEET (2018–2021)

4.9.2 AIRBORNE

FIGURE 12 US: AIR FLEET (2018–2021)

4.9.3 NAVAL

FIGURE 13 US: NAVAL FLEET (2019–2022)

4.9.4 SPACE

FIGURE 14 US: SATELLITES (2018–2021)

4.9.5 CYBER

4.10 DEFENSE BUDGET ANALYSIS, BY SYSTEM ALLOCATION

4.10.1 ELECTRONICS

4.10.1.1 Intelligence, surveillance, and reconnaissance

4.10.1.2 Communication, navigation, and surveillance

4.10.1.3 Global navigation satellite system

4.10.1.4 Electronic warfare

4.10.1.5 Digital battlefield

4.10.2 ARMAMENTS

4.10.2.1 Weapons and munitions

4.10.2.2 Firearms and ammunition

TABLE 20 KEY FIREARMS USED BY US ARMED FORCES

TABLE 21 KEY CALIBERS USED BY US ARMED FORCES

4.11 DEFENSE BUDGET ANALYSIS, BY TECHNOLOGY ALLOCATION

4.11.1 ADVANCED

4.11.1.1 Use cases

4.11.2 CONVENTIONAL

4.11.2.1 Use cases

4.12 DEFENSE BUDGET ANALYSIS, BY DOMAIN ALLOCATION

4.12.1 MILITARY FORCES

4.12.2 SPECIAL FORCES

4.13 DEFENSE BUDGET ANALYSIS, BY ALLOCATION TYPE

4.13.1 MILITARY EXPENSE

4.13.2 ADMIN EXPENSE

4.14 DEFENSE BUDGET ANALYSIS, BY SALES OVERHEAD

4.14.1 FOREIGN MILITARY SALES

4.14.2 INDIGENOUS SALES

4.15 DEFENSE BUDGET ANALYSIS, COMPETITIVE SCENARIOS

4.15.1 COMPETITIVE LANDSCAPE

4.15.1.1 Company ranking analysis

FIGURE 15 RANKING ANALYSIS OF TOP 3 PLAYERS IN US DEFENSE BUDGET ANALYSIS, 2022

4.15.1.2 Competitive benchmarking

TABLE 22 US DEFENSE BUDGET ANALYSIS: COMPETITIVE BENCHMARKING

4.15.2 PRIME CONTRACTORS

4.15.2.1 Northrop Grumman Corporation

4.15.2.1.1 Business overview

TABLE 23 NORTHROP GRUMMAN CORPORATION: COMPANY OVERVIEW

FIGURE 16 NORTHROP GRUMMAN CORPORATION: COMPANY SNAPSHOT

4.15.2.1.2 SWOT analysis

4.15.2.1.3 Recent developments

4.15.2.1.4 MnM view

4.15.2.2 General Dynamics Corporation

4.15.2.2.1 Business overview

TABLE 24 GENERAL DYNAMICS CORPORATION: COMPANY OVERVIEW

FIGURE 17 GENERAL DYNAMICS CORPORATION: COMPANY SNAPSHOT

4.15.2.2.2 SWOT Analysis

4.15.2.2.3 Recent developments

4.15.2.2.4 MnM view

4.15.2.3 Lockheed Martin Corporation

4.15.2.3.1 Business overview

TABLE 25 LOCKHEED MARTIN CORPORATION: COMPANY OVERVIEW

FIGURE 18 LOCKHEED MARTIN CORPORATION: COMPANY SNAPSHOT

4.15.2.3.2 SWOT analysis

4.15.2.3.3 Recent developments

4.15.2.3.4 MnM view

5 CANADA DEFENSE BUDGET ANALYSIS

5.1 INTRODUCTION

FIGURE 19 CANADA: DEFENSE BUDGET (2016–2022)

TABLE 26 CANADA: DEFENSE BUDGET ANALYSIS, 2019–2022 (USD BILLION)

TABLE 27 CANADA: DEFENSE BUDGET ANALYSIS, 2023–2028 (USD BILLION)

TABLE 28 CANADA: DEFENSE BUDGET ANALYSIS, BY ALLOCATION TYPE,

2019–2022 (USD BILLION)

TABLE 29 CANADA: DEFENSE BUDGET ANALYSIS, BY ALLOCATION TYPE,
2023–2028 (USD BILLION)

TABLE 30 CANADA: DEFENSE BUDGET ANALYSIS, BY DOMAIN ALLOCATION,
2019–2022 (USD BILLION)

TABLE 31 CANADA: DEFENSE BUDGET ANALYSIS, BY DOMAIN ALLOCATION,
2023–2028 (USD BILLION)

TABLE 32 CANADA: DEFENSE BUDGET ANALYSIS, BY PLATFORM ALLOCATION,
2019–2022 (USD BILLION)

TABLE 33 CANADA: DEFENSE BUDGET ANALYSIS, BY PLATFORM ALLOCATION,
2023–2028 (USD BILLION)

TABLE 34 CANADA: DEFENSE BUDGET ANALYSIS, BY SYSTEM ALLOCATION,
2019–2022 (USD BILLION)

TABLE 35 CANADA: DEFENSE BUDGET ANALYSIS, BY SYSTEM ALLOCATION,
2023–2028 (USD BILLION)

TABLE 36 CANADA: DEFENSE BUDGET ANALYSIS, BY TECHNOLOGY
ALLOCATION, 2019–2022 (USD BILLION)

TABLE 37 CANADA: DEFENSE BUDGET ANALYSIS, BY TECHNOLOGY
ALLOCATION, 2023–2028 (USD BILLION)

5.2 TRENDS/DISRUPTIONS IMPACTING CONTRACTOR BUSINESS

FIGURE 20 REVENUE SHIFT AND NEW REVENUE POCKETS

5.3 REGULATORY AND POLICY LANDSCAPE

5.4 IMPACT OF MEGATRENDS

5.5 TECHNOLOGY TRENDS

5.5.1 QUANTUM COMPUTING

5.6 TREND INDICATORS

5.6.1 MACRO

5.6.1.1 GDP and defense budget share (%) of GDP

FIGURE 21 CANADA: DEFENSE BUDGET AS % OF GDP (2016–2022)

5.6.1.2 Geopolitical intensity/external disputes

5.6.1.3 Development index

5.6.1.4 Terrorism index

5.6.1.5 Recession impact analysis

5.6.2 MICRO

5.6.2.1 Military strength/recruitment

5.6.2.2 Military modernization

5.6.2.3 Soldier welfare

5.7 EXPORT AND IMPORT/TRADE ANALYSIS

TABLE 38 CANADA: EXPORT DATA (USD THOUSAND)

TABLE 39 CANADA: IMPORT DATA (USD THOUSAND)**5.8 DEFENSE BUDGET ANALYSIS, BY DEPARTMENTAL ALLOCATION****5.8.1 MILITARY**

- 5.8.1.1 Department of National Defense
- 5.8.1.2 Canadian Armed Forces
- 5.8.1.3 Defense Research and Development Canada
- 5.8.1.4 Communications Security Establishment
- 5.8.1.5 Canadian Security Intelligence Service
- 5.8.1.6 Canadian Border Services Agency
- 5.8.1.7 Canadian Security and Intelligence Review Committee

5.8.2 HOMELAND SECURITY

- 5.8.2.1 Public Safety Canada
- 5.8.2.2 Royal Canadian Mounted Police
- 5.8.2.3 Integrated Terrorism Assessment Centre
- 5.8.2.4 Canadian Centre for Cyber Security
- 5.8.2.5 Joint Task Force 2
- 5.8.2.6 Provincial and Municipal Police Forces

5.9 DEFENSE BUDGET ANALYSIS, BY PLATFORM ALLOCATION**5.9.1 LAND****FIGURE 22 CANADA: LAND FLEET (2018–2022)****5.9.2 AIRBORNE****FIGURE 23 CANADA: AIR FLEET (2018–2021)****5.9.3 NAVAL****FIGURE 24 CANADA: NAVAL FLEET (2019–2022)****5.9.4 SPACE****FIGURE 25 CANADA: SATELLITES (2018–2021)****5.9.5 CYBER****5.10 DEFENSE BUDGET ANALYSIS, BY SYSTEM ALLOCATION****5.10.1 ELECTRONICS**

- 5.10.1.1 Intelligence, surveillance, and reconnaissance
- 5.10.1.2 Communication, navigation, and surveillance
- 5.10.1.3 Global navigation satellite system
- 5.10.1.4 Electronic warfare
- 5.10.1.5 Digital battlefield

5.10.2 ARMAMENTS

- 5.10.2.1 Weapons and munitions
- 5.10.2.2 Firearms and ammunition

TABLE 40 KEY FIREARMS USED BY CANADIAN ARMED FORCES**TABLE 41 KEY CALIBERS USED BY CANADIAN ARMED FORCES**

5.11 DEFENSE BUDGET ANALYSIS, BY TECHNOLOGY ALLOCATION

5.11.1 ADVANCED

5.11.1.1 Use cases

5.11.2 CONVENTIONAL

5.11.2.1 Use cases

5.12 DEFENSE BUDGET ANALYSIS, BY DOMAIN ALLOCATION

5.12.1 MILITARY FORCES

5.12.1.1 Canadian Army

5.12.1.2 Royal Canadian Navy

5.12.1.3 Royal Canadian Air Force

5.12.2 SPECIAL FORCES

5.13 DEFENSE BUDGET ANALYSIS, BY ALLOCATION TYPE

5.13.1 MILITARY EXPENSE

5.13.2 ADMIN EXPENSE

5.14 DEFENSE BUDGET ANALYSIS, BY SALES OVERHEAD

5.14.1 FOREIGN MILITARY SALES

5.14.2 INDIGENOUS SALES

5.15 DEFENSE BUDGET ANALYSIS, COMPETITIVE SCENARIOS

5.15.1 COMPETITIVE LANDSCAPE

5.15.1.1 Company ranking analysis

FIGURE 26 RANKING ANALYSIS OF TOP 3 PLAYERS IN CANADA DEFENSE BUDGET ANALYSIS, 2022

5.15.1.2 Competitive benchmarking

TABLE 42 CANADA DEFENSE BUDGET ANALYSIS MARKET: COMPETITIVE BENCHMARKING

5.15.2 PRIME CONTRACTORS

5.15.2.1 Lockheed Martin Corporation

TABLE 43 LOCKHEED MARTIN CORPORATION: COMPANY OVERVIEW

5.15.2.2 CAE Inc.

5.15.2.2.1 Business overview

TABLE 44 CAE INC.: COMPANY OVERVIEW

FIGURE 27 CAE INC.: COMPANY SNAPSHOT

5.15.2.2.2 SWOT analysis

5.15.2.2.3 Recent developments

5.15.2.2.4 MnM view

5.15.2.3 General Dynamics Land Systems Inc.

5.15.2.3.1 Business overview

TABLE 45 GENERAL DYNAMICS LAND SYSTEMS INC.: COMPANY OVERVIEW

5.15.2.3.2 SWOT analysis

5.15.2.3.3 Recent developments

5.15.2.3.4 MnM view

6 UK DEFENSE BUDGET ANALYSIS

6.1 INTRODUCTION

FIGURE 28 UK: DEFENSE BUDGET (2016–2022)

TABLE 46 UK: DEFENSE BUDGET ANALYSIS, 2019–2022 (USD BILLION)

TABLE 47 UK: DEFENSE BUDGET ANALYSIS, 2023–2028 (USD BILLION)

TABLE 48 UK: DEFENSE BUDGET ANALYSIS, BY ALLOCATION TYPE, 2019–2022 (USD BILLION)

TABLE 49 UK: DEFENSE BUDGET ANALYSIS, BY ALLOCATION TYPE, 2023–2028 (USD BILLION)

TABLE 50 UK: DEFENSE BUDGET ANALYSIS, BY DOMAIN ALLOCATION, 2019–2022 (USD BILLION)

TABLE 51 UK: DEFENSE BUDGET ANALYSIS, BY DOMAIN ALLOCATION, 2023–2028 (USD BILLION)

TABLE 52 UK: DEFENSE BUDGET ANALYSIS, BY PLATFORM ALLOCATION, 2019–2022 (USD BILLION)

TABLE 53 UK: DEFENSE BUDGET ANALYSIS, BY PLATFORM ALLOCATION, 2023–2028 (USD BILLION)

TABLE 54 UK: DEFENSE BUDGET ANALYSIS, BY SYSTEM ALLOCATION, 2019–2022 (USD BILLION)

TABLE 55 UK: DEFENSE BUDGET ANALYSIS, BY SYSTEM ALLOCATION, 2023–2028 (USD BILLION)

TABLE 56 UK: DEFENSE BUDGET ANALYSIS, BY TECHNOLOGY ALLOCATION, 2019–2022 (USD BILLION)

TABLE 57 UK: DEFENSE BUDGET ANALYSIS, BY TECHNOLOGY ALLOCATION, 2023–2028 (USD BILLION)

6.2 TRENDS/DISRUPTIONS IMPACTING CONTRACTOR BUSINESS

FIGURE 29 REVENUE SHIFT AND NEW REVENUE POCKETS

6.3 REGULATORY AND POLICY LANDSCAPE

6.4 IMPACT OF MEGATRENDS

6.5 TECHNOLOGY TRENDS

6.5.1 FUTURE COMBAT AIR SYSTEM

6.6 TREND INDICATORS

6.6.1 MACRO

6.6.1.1 GDP and defense budget share (%) of GDP

FIGURE 30 UK: DEFENSE BUDGET AS % OF GDP (2016–2022)

- 6.6.1.2 Geopolitical intensity/external disputes
- 6.6.1.3 Development index
- 6.6.1.4 Terrorism index
- 6.6.1.5 Recession impact analysis
- 6.6.2 MICRO
 - 6.6.2.1 Military strength/recruitment
 - 6.6.2.2 Military modernization
 - 6.6.2.3 Soldier welfare
- 6.7 EXPORT AND IMPORT/TRADE ANALYSIS
- TABLE 58 UK: EXPORT DATA (USD THOUSAND)
- TABLE 59 UK: IMPORT DATA (USD THOUSAND)
- 6.8 DEFENSE BUDGET ANALYSIS, BY DEPARTMENTAL ALLOCATION
 - 6.8.1 MILITARY
 - 6.8.1.1 Ministry of Defence
 - 6.8.1.2 British Army
 - 6.8.1.3 Royal Navy
 - 6.8.1.4 Royal Air Force
 - 6.8.1.5 Defense Equipment and Support
 - 6.8.1.6 Joint Forces Command
 - 6.8.2 HOMELAND SECURITY
- 6.9 DEFENSE BUDGET ANALYSIS, BY PLATFORM ALLOCATION
 - 6.9.1 LAND
 - FIGURE 31 UK: LAND FLEET (2018–2021)
 - 6.9.2 AIRBORNE
 - FIGURE 32 UK: AIR FLEET (2018–2021)
 - 6.9.3 NAVAL
 - FIGURE 33 UK: NAVAL FLEET (2019–2022)
 - 6.9.4 SPACE
 - FIGURE 34 UK: SATELLITES (2018–2021)
 - 6.9.5 CYBER
- 6.10 DEFENSE BUDGET ANALYSIS, BY SYSTEM ALLOCATION
 - 6.10.1 ELECTRONICS
 - 6.10.1.1 Intelligence, surveillance, and reconnaissance
 - 6.10.1.2 Communication, navigation, and surveillance
 - 6.10.1.3 Global navigation satellite system
 - 6.10.1.4 Electronic warfare
 - 6.10.1.5 Digital battlefield
 - 6.10.2 ARMAMENTS
 - 6.10.2.1 Weapons and munitions

6.10.2.2 Firearms and ammunition

TABLE 60 KEY FIREARMS USED BY UK ARMED FORCES

TABLE 61 KEY CALIBERS USED BY UK ARMED FORCES

6.11 DEFENSE BUDGET ANALYSIS, BY TECHNOLOGY ALLOCATION

6.11.1 ADVANCED

6.11.1.1 Use cases

6.11.2 CONVENTIONAL

6.11.2.1 Use cases

6.12 DEFENSE BUDGET ANALYSIS, BY DOMAIN ALLOCATION

6.12.1 MILITARY FORCES

6.12.1.1 British Army

6.12.1.2 Royal Navy

6.12.1.3 Royal Air Force

6.12.2 SPECIAL FORCES

6.12.2.1 Special Air Service

6.12.2.2 Special Boat Service

6.13 DEFENSE BUDGET ANALYSIS, BY ALLOCATION TYPE

6.13.1 MILITARY EXPENSE

6.13.2 ADMIN EXPENSE

6.14 DEFENSE BUDGET ANALYSIS, BY SALES OVERHEAD

6.14.1 FOREIGN MILITARY SALES

6.14.2 INDIGENOUS SALES

6.15 DEFENSE BUDGET ANALYSIS, COMPETITIVE SCENARIOS

6.15.1 COMPETITIVE LANDSCAPE

6.15.1.1 Company ranking analysis

FIGURE 35 RANKING ANALYSIS OF TOP 3 PLAYERS IN UK DEFENSE BUDGET ANALYSIS, 2022

6.15.1.2 Competitive benchmarking

TABLE 62 UK DEFENSE BUDGET ANALYSIS: COMPETITIVE BENCHMARKING

6.15.2 PRIME CONTRACTORS

6.15.2.1 Babcock International Group PLC

6.15.2.1.1 Business overview

TABLE 63 BABCOCK INTERNATIONAL GROUP PLC: COMPANY OVERVIEW

FIGURE 36 BABCOCK INTERNATIONAL GROUP PLC: COMPANY SNAPSHOT

6.15.2.1.2 SWOT analysis

6.15.2.1.3 Recent developments

6.15.2.1.4 MnM view

6.15.2.2 BAE Systems plc

6.15.2.2.1 Business overview

TABLE 64 BAE SYSTEMS PLC: COMPANY OVERVIEW

FIGURE 37 BAE SYSTEMS PLC: COMPANY SNAPSHOT

6.15.2.2.2 SWOT analysis

6.15.2.2.3 Recent developments

6.15.2.2.4 MnM view

6.15.2.3 Lockheed Martin Corporation

TABLE 65 LOCKHEED MARTIN CORPORATION: COMPANY OVERVIEW

7 FRANCE DEFENSE BUDGET ANALYSIS

7.1 INTRODUCTION

FIGURE 38 FRANCE: DEFENSE BUDGET (2016–2022)

TABLE 66 FRANCE: DEFENSE BUDGET ANALYSIS, 2019–2022 (USD BILLION)

TABLE 67 FRANCE: DEFENSE BUDGET ANALYSIS, 2023–2028 (USD BILLION)

TABLE 68 FRANCE: DEFENSE BUDGET ANALYSIS, BY ALLOCATION TYPE, 2019–2022 (USD BILLION)

TABLE 69 FRANCE: DEFENSE BUDGET ANALYSIS, BY ALLOCATION TYPE, 2023–2028 (USD BILLION)

TABLE 70 FRANCE: DEFENSE BUDGET ANALYSIS, BY DOMAIN ALLOCATION, 2019–2022 (USD BILLION)

TABLE 71 FRANCE: DEFENSE BUDGET ANALYSIS, BY DOMAIN ALLOCATION, 2023–2028 (USD BILLION)

TABLE 72 FRANCE: DEFENSE BUDGET ANALYSIS, BY PLATFORM ALLOCATION, 2019–2022 (USD BILLION)

TABLE 73 FRANCE: DEFENSE BUDGET ANALYSIS, BY PLATFORM ALLOCATION, 2023–2028 (USD BILLION)

TABLE 74 FRANCE: DEFENSE BUDGET ANALYSIS, BY SYSTEM ALLOCATION, 2019–2022 (USD BILLION)

TABLE 75 FRANCE: DEFENSE BUDGET ANALYSIS, BY SYSTEM ALLOCATION, 2023–2028 (USD BILLION)

TABLE 76 FRANCE: DEFENSE BUDGET ANALYSIS, BY TECHNOLOGY ALLOCATION, 2019–2022 (USD BILLION)

TABLE 77 FRANCE: DEFENSE BUDGET ANALYSIS, BY TECHNOLOGY ALLOCATION, 2023–2028 (USD BILLION)

7.2 TRENDS/DISRUPTIONS IMPACTING CONTRACTOR BUSINESS

FIGURE 39 REVENUE SHIFT AND NEW REVENUE POCKETS

7.3 REGULATORY AND POLICY LANDSCAPE

7.4 IMPACT OF MEGATRENDS

7.5 TECHNOLOGY TRENDS

7.5.1 FUTURE COMBAT AIR SYSTEM

7.5.2 CYBERSECURITY AND INFORMATION WARFARE

7.6 TREND INDICATORS

7.6.1 MACRO

7.6.1.1 GDP and defense budget share (%) of GDP

FIGURE 40 FRANCE: DEFENSE BUDGET AS % OF GDP (2016–2022)

7.6.1.2 Geopolitical intensity/external disputes

7.6.1.3 Development index

7.6.1.4 Terrorism index

7.6.1.5 Recession impact analysis

7.6.2 MICRO

7.6.2.1 Military strength/recruitment

7.6.2.2 Military modernization

7.6.2.3 Soldier welfare

7.7 EXPORT AND IMPORT/TRADE ANALYSIS

TABLE 78 FRANCE: EXPORT DATA (USD THOUSAND)

TABLE 79 FRANCE: IMPORT DATA (USD THOUSAND)

7.8 DEFENSE BUDGET ANALYSIS, BY DEPARTMENTAL ALLOCATION

7.8.1 MILITARY

7.8.1.1 French Army

7.8.1.2 French Navy

7.8.1.3 French Air and Space Force

7.8.2 HOMELAND SECURITY

7.8.2.1 Ministry of the Interior

7.8.2.2 National Police

7.8.2.3 Gendarmerie Nationale

7.8.2.4 General Directorate for Internal Security

7.8.2.5 General Directorate of Foreign Security

7.8.2.6 Directorate-General for Civil Protection and Crisis Management

7.9 DEFENSE BUDGET ANALYSIS, BY PLATFORM ALLOCATION

7.9.1 LAND

FIGURE 41 FRANCE: LAND FLEET (2018–2021)

7.9.2 AIRBORNE

FIGURE 42 FRANCE: AIR FLEET (2018–2021)

7.9.3 NAVAL

FIGURE 43 FRANCE: NAVAL FLEET (2019–2022)

7.9.4 SPACE

FIGURE 44 FRANCE: SATELLITES (2018–2021)

7.9.5 CYBER

7.10 DEFENSE BUDGET ANALYSIS, BY SYSTEM ALLOCATION

7.10.1 ELECTRONICS

7.10.1.1 Intelligence, surveillance, and reconnaissance

7.10.1.2 Communication, navigation, and surveillance

7.10.1.3 Global navigation satellite system

7.10.1.4 Electronic warfare

7.10.1.5 Digital battlefield

7.10.2 ARMAMENTS

7.10.2.1 Weapons and munitions

7.10.2.2 Firearms and ammunition

TABLE 80 KEY FIREARMS USED BY FRENCH ARMED FORCES

TABLE 81 KEY CALIBERS USED BY FRENCH ARMED FORCES

7.11 DEFENSE BUDGET ANALYSIS, BY TECHNOLOGY ALLOCATION

7.11.1 ADVANCED

7.11.1.1 Use cases

7.11.2 CONVENTIONAL

7.11.2.1 Use cases

7.12 DEFENSE BUDGET ANALYSIS, BY DOMAIN ALLOCATION

7.12.1 MILITARY FORCES

7.12.1.1 Army

7.12.1.2 Navy

7.12.1.3 Air and Space Force

7.12.1.4 Gendarmerie

7.12.2 SPECIAL FORCES

7.13 DEFENSE BUDGET ANALYSIS, BY ALLOCATION TYPE

7.13.1 MILITARY EXPENSE

7.13.2 ADMIN EXPENSE

7.14 DEFENSE BUDGET ANALYSIS, BY SALES OVERHEAD

7.14.1 FOREIGN MILITARY SALES

7.14.2 INDIGENOUS SALES

7.15 DEFENSE BUDGET ANALYSIS, COMPETITIVE SCENARIOS

7.15.1 COMPETITIVE LANDSCAPE

7.15.1.1 Company ranking analysis

FIGURE 45 RANKING ANALYSIS OF TOP 3 PLAYERS IN FRANCE DEFENSE BUDGET ANALYSIS, 2022

7.15.1.2 Competitive benchmarking

TABLE 82 FRANCE DEFENSE BUDGET ANALYSIS MARKET: COMPETITIVE BENCHMARKING

7.15.2 PRIME CONTRACTORS

7.15.2.1 Airbus SE

7.15.2.1.1 Business overview

TABLE 83 AIRBUS SE: COMPANY OVERVIEW

FIGURE 46 AIRBUS SE: COMPANY SNAPSHOT

7.15.2.1.2 SWOT analysis

7.15.2.1.3 Recent developments

7.15.2.1.4 MnM view

7.15.2.2 Safran SA

7.15.2.2.1 Business overview

TABLE 84 SAFRAN SA: COMPANY OVERVIEW

FIGURE 47 SAFRAN SA: COMPANY SNAPSHOT

7.15.2.2.2 SWOT analysis

7.15.2.2.3 Recent Developments

7.15.2.2.4 MnM View

7.15.2.3 Thales SA

7.15.2.3.1 Business overview

TABLE 85 THALES SA: COMPANY OVERVIEW

FIGURE 48 THALES SA: COMPANY SNAPSHOT

7.15.2.3.2 SWOT analysis

7.15.2.3.3 Recent developments

7.15.2.3.4 MnM view

8 GERMANY DEFENSE BUDGET ANALYSIS

8.1 INTRODUCTION

FIGURE 49 GERMANY: DEFENSE BUDGET (2016-2022)

TABLE 86 GERMANY: DEFENSE BUDGET ANALYSIS, 2019–2022 (USD BILLION)

TABLE 87 GERMANY: DEFENSE BUDGET ANALYSIS, 2023–2028 (USD BILLION)

TABLE 88 GERMANY: DEFENSE BUDGET ANALYSIS, BY ALLOCATION TYPE, 2019–2022 (USD BILLION)

TABLE 89 GERMANY: DEFENSE BUDGET ANALYSIS, BY ALLOCATION TYPE, 2023–2028 (USD BILLION)

TABLE 90 GERMANY: DEFENSE BUDGET ANALYSIS, BY DOMAIN ALLOCATION, 2019–2022 (USD BILLION)

TABLE 91 GERMANY: DEFENSE BUDGET ANALYSIS, BY DOMAIN ALLOCATION, 2023–2028 (USD BILLION)

TABLE 92 GERMANY: DEFENSE BUDGET ANALYSIS, BY PLATFORM ALLOCATION, 2019–2022 (USD BILLION)

TABLE 93 GERMANY: DEFENSE BUDGET ANALYSIS, BY PLATFORM

ALLOCATION, 2023–2028 (USD BILLION)

TABLE 94 GERMANY: DEFENSE BUDGET ANALYSIS, BY SYSTEM ALLOCATION, 2019–2022 (USD BILLION)

TABLE 95 GERMANY: DEFENSE BUDGET ANALYSIS, BY SYSTEM ALLOCATION, 2023–2028 (USD BILLION)

TABLE 96 GERMANY: DEFENSE BUDGET ANALYSIS, BY TECHNOLOGY ALLOCATION, 2019–2022 (USD BILLION)

TABLE 97 GERMANY: DEFENSE BUDGET ANALYSIS, BY TECHNOLOGY ALLOCATION, 2023–2028 (USD BILLION)

8.2 TRENDS/DISRUPTIONS IMPACTING CONTRACTOR BUSINESS

FIGURE 50 REVENUE SHIFT AND NEW REVENUE POCKETS

8.3 REGULATORY AND POLICY LANDSCAPE

8.4 IMPACT OF MEGATRENDS

8.5 TECHNOLOGY TRENDS

8.5.1 NETWORK-CENTRIC WARFARE

8.5.2 ADVANCED SENSORS AND SURVEILLANCE

8.6 TREND INDICATORS

8.6.1 MACRO

8.6.1.1 GDP and defense budget share (%) of GDP

FIGURE 51 GERMANY: DEFENSE BUDGET AS % OF GDP (2016–2022)

8.6.1.2 Geopolitical intensity/external disputes

8.6.1.3 Development index

8.6.1.4 Terrorism index

8.6.1.5 Recession impact analysis

8.6.2 MICRO

8.6.2.1 Military strength/recruitment

8.6.2.2 Military modernization

8.6.2.3 Soldier welfare

8.7 EXPORT AND IMPORT/TRADE ANALYSIS

TABLE 98 GERMANY: EXPORT DATA (USD THOUSAND)

TABLE 99 GERMANY: IMPORT DATA (USD THOUSAND)

8.8 DEFENSE BUDGET ANALYSIS, BY DEPARTMENTAL ALLOCATION

8.8.1 MILITARY

8.8.1.1 Army

8.8.1.2 Navy

8.8.1.3 Air Force

8.8.1.4 Joint Support Service

8.8.1.5 Cyber and Information Domain Service

8.8.1.6 Medical Service

- 8.8.1.7 Military Police
- 8.8.2 HOMELAND SECURITY
 - 8.8.2.1 Federal Police
 - 8.8.2.2 Federal Criminal Police Office
 - 8.8.2.3 State Police
 - 8.8.2.4 Federal Office for the Protection of the Constitution
 - 8.8.2.5 Federal Agency for Technical Relief
 - 8.8.2.6 Customs Administration
- 8.9 DEFENSE BUDGET ANALYSIS, BY PLATFORM ALLOCATION
 - 8.9.1 LAND
 - FIGURE 52 GERMANY: LAND FLEET (2018–2021)
 - 8.9.2 AIRBORNE
 - FIGURE 53 GERMANY: AIR FLEET (2018–2021)
 - 8.9.3 NAVAL
 - FIGURE 54 GERMANY: NAVAL FLEET (2019–2022)
 - 8.9.4 SPACE
 - FIGURE 55 GERMANY: SATELLITES (2018–2021)
 - 8.9.5 CYBER
- 8.10 DEFENSE BUDGET ANALYSIS, BY SYSTEM ALLOCATION
 - 8.10.1 ELECTRONICS
 - 8.10.1.1 Intelligence, surveillance, and reconnaissance
 - 8.10.1.2 Communication, navigation, and surveillance
 - 8.10.1.3 Global navigation satellite system
 - 8.10.1.4 Electronic warfare
 - 8.10.1.5 Digital battlefield
 - 8.10.2 ARMAMENTS
 - 8.10.2.1 Weapons and munitions
 - 8.10.2.2 Firearms and ammunition
- TABLE 100 KEY FIREARMS USED BY GERMAN ARMED FORCES
- TABLE 101 KEY CALIBERS USED BY GERMAN ARMED FORCES
- 8.11 DEFENSE BUDGET ANALYSIS, BY TECHNOLOGY ALLOCATION
 - 8.11.1 ADVANCED
 - 8.11.1.1 Use cases
 - 8.11.2 CONVENTIONAL
 - 8.11.2.1 Use cases
- 8.12 DEFENSE BUDGET ANALYSIS, BY DOMAIN ALLOCATION
 - 8.12.1 MILITARY FORCES
 - 8.12.1.1 German Army
 - 8.12.1.2 German Navy

8.12.1.3 German Air Force

8.12.1.4 Joint Support Service

8.12.1.5 Cyber and Information Domain Service

8.12.2 SPECIAL FORCES

8.13 DEFENSE BUDGET ANALYSIS, BY ALLOCATION TYPE

8.13.1 MILITARY EXPENSE

8.13.2 ADMIN EXPENSE

8.14 DEFENSE BUDGET ANALYSIS, BY SALES OVERHEAD

8.14.1 FOREIGN MILITARY SALES

8.14.2 INDIGENOUS SALES

8.15 DEFENSE BUDGET ANALYSIS, COMPETITIVE SCENARIOS

8.15.1 COMPETITIVE LANDSCAPE

8.15.1.1 Company ranking analysis

FIGURE 56 RANKING ANALYSIS OF TOP 3 PLAYERS IN GERMANY DEFENSE BUDGET ANALYSIS, 2022

8.15.1.2 Competitive benchmarking

TABLE 102 GERMANY DEFENSE BUDGET ANALYSIS: COMPETITIVE BENCHMARKING

8.15.2 PRIME CONTRACTORS

8.15.2.1 Rheinmetall AG

8.15.2.1.1 Business overview

TABLE 103 RHEINMETALL AG: COMPANY OVERVIEW

FIGURE 57 RHEINMETALL AG: COMPANY SNAPSHOT

8.15.2.1.2 SWOT analysis

8.15.2.1.3 Recent developments

8.15.2.1.4 MnM view

8.15.2.2 Leonardo SpA

8.15.2.2.1 Business overview

TABLE 104 LEONARDO SPA: COMPANY OVERVIEW

FIGURE 58 LEONARDO SPA: COMPANY SNAPSHOT

8.15.2.2.2 SWOT analysis

8.15.2.2.3 Recent developments

8.15.2.2.4 MnM view

8.15.2.3 Thales SA

TABLE 105 THALES SA: COMPANY OVERVIEW

9 RUSSIA DEFENSE BUDGET ANALYSIS

9.1 INTRODUCTION

FIGURE 59 RUSSIA: DEFENSE BUDGET (2016–2022)

TABLE 106 RUSSIA: DEFENSE BUDGET ANALYSIS, 2019–2022 (USD BILLION)

TABLE 107 RUSSIA: DEFENSE BUDGET ANALYSIS, 2023–2028 (USD BILLION)

TABLE 108 RUSSIA: DEFENSE BUDGET ANALYSIS, BY ALLOCATION TYPE, 2019–2022 (USD BILLION)

TABLE 109 RUSSIA: DEFENSE BUDGET ANALYSIS, BY ALLOCATION TYPE, 2023–2028 (USD BILLION)

TABLE 110 RUSSIA: DEFENSE BUDGET ANALYSIS, BY DOMAIN ALLOCATION, 2019–2022 (USD BILLION)

TABLE 111 RUSSIA: DEFENSE BUDGET ANALYSIS, BY DOMAIN ALLOCATION, 2023–2028 (USD BILLION)

TABLE 112 RUSSIA: DEFENSE BUDGET ANALYSIS, BY PLATFORM ALLOCATION, 2019–2022 (USD BILLION)

TABLE 113 RUSSIA: DEFENSE BUDGET ANALYSIS, BY PLATFORM ALLOCATION, 2023–2028 (USD BILLION)

TABLE 114 RUSSIA: DEFENSE BUDGET ANALYSIS, BY SYSTEM ALLOCATION, 2019–2022 (USD BILLION)

TABLE 115 RUSSIA: DEFENSE BUDGET ANALYSIS, BY SYSTEM ALLOCATION, 2023–2028 (USD BILLION)

TABLE 116 RUSSIA: DEFENSE BUDGET ANALYSIS, BY TECHNOLOGY ALLOCATION, 2019–2022 (USD BILLION)

TABLE 117 RUSSIA: DEFENSE BUDGET ANALYSIS, BY TECHNOLOGY ALLOCATION, 2023–2028 (USD BILLION)

9.2 TRENDS/DISRUPTIONS IMPACTING CONTRACTOR BUSINESS

FIGURE 60 REVENUE SHIFT AND NEW REVENUE POCKETS

9.3 REGULATORY AND POLICY LANDSCAPE

9.4 IMPACT OF MEGATRENDS

9.5 TECHNOLOGY TRENDS

9.5.1 ASYMMETRIC FORCE-MULTIPLIER TECHNOLOGIES

9.5.2 HYPERSONIC MISSILES

9.6 TREND INDICATORS

9.6.1 MACRO

9.6.1.1 GDP and defense budget share (%) of GDP

FIGURE 61 RUSSIA: DEFENSE BUDGET AS % OF GDP (2016–2022)

9.6.1.2 Geopolitical intensity/external disputes

9.6.1.3 Development index

9.6.1.4 Terrorism index

9.6.1.5 Recession impact analysis

9.6.2 MICRO

9.6.2.1 Military strength/recruitment

9.6.2.2 Military modernization

9.6.2.3 Soldier welfare

9.7 EXPORT AND IMPORT/TRADE ANALYSIS

9.8 DEFENSE BUDGET ANALYSIS, BY DEPARTMENTAL ALLOCATION

9.8.1 MILITARY

9.8.1.1 Ministry of Defense

9.8.1.2 Ground Forces

9.8.1.3 Navy

9.8.1.4 Aerospace Forces

9.8.1.5 Strategic Missile Troops

9.8.1.6 Airborne Troops

9.8.1.7 Space Forces

9.8.2 HOMELAND SECURITY

9.8.2.1 Federal Security Service

9.8.2.2 Ministry of Internal Affairs

9.8.2.3 National Guard of Russia

9.8.2.4 Ministry of Emergency Situations

9.8.2.5 Border Guard Service

9.8.2.6 Federal Protective Service

9.9 DEFENSE BUDGET ANALYSIS, BY PLATFORM ALLOCATION

9.9.1 LAND

FIGURE 62 RUSSIA: LAND FLEET (2018–2021)

9.9.2 AIRBORNE

FIGURE 63 RUSSIA: AIR FLEET (2018–2021)

9.9.3 NAVAL

FIGURE 64 RUSSIA: NAVAL FLEET (2019–2022)

9.9.4 SPACE

FIGURE 65 RUSSIA: SATELLITES (2018–2021)

9.9.5 CYBER

9.10 DEFENSE BUDGET ANALYSIS, BY SYSTEM ALLOCATION

9.10.1 ELECTRONICS

9.10.1.1 Intelligence, surveillance, and reconnaissance

9.10.1.2 Communication, navigation, and surveillance

9.10.1.3 Global navigation satellite system

9.10.1.4 Electronic warfare

9.10.1.5 Digital battlefield

9.10.2 ARMAMENTS

9.10.2.1 Weapons and munitions

9.10.2.2 Firearms and ammunition

TABLE 118 KEY FIREARMS USED BY RUSSIAN ARMED FORCES

TABLE 119 KEY CALIBERS USED BY RUSSIAN ARMED FORCES

9.11 DEFENSE BUDGET ANALYSIS, BY TECHNOLOGY ALLOCATION

9.11.1 ADVANCED

9.11.1.1 Use cases

9.11.2 CONVENTIONAL

9.11.2.1 Use cases

9.12 DEFENSE BUDGET ANALYSIS, BY DOMAIN ALLOCATION

9.12.1 MILITARY FORCES

9.12.1.1 Russian Armed Forces

9.12.1.2 Russian Ground Forces

9.12.1.3 Russian Navy

9.12.1.4 Russian Aerospace Forces

9.12.1.5 Strategic Missile Troops

9.12.1.6 Russian Airborne Troops

9.12.2 SPECIAL FORCES

9.13 DEFENSE BUDGET ANALYSIS, BY ALLOCATION TYPE

9.13.1 MILITARY EXPENSE

9.13.2 ADMIN EXPENSE

9.14 DEFENSE BUDGET ANALYSIS, BY SALES OVERHEAD

9.14.1 FOREIGN MILITARY SALES

9.14.2 INDIGENOUS SALES

9.15 DEFENSE BUDGET ANALYSIS, COMPETITIVE SCENARIOS

9.15.1 COMPETITIVE LANDSCAPE

9.15.1.1 Company ranking analysis

FIGURE 66 RANKING ANALYSIS OF TOP 3 PLAYERS IN RUSSIA DEFENSE
BUDGET ANALYSIS, 2022

9.15.1.2 Competitive benchmarking

TABLE 120 RUSSIA DEFENSE BUDGET ANALYSIS: COMPETITIVE
BENCHMARKING

9.15.2 PRIME CONTRACTORS

9.15.2.1 UralVagonZavod (UVZ)

9.15.2.1.1 Business overview

TABLE 121 URALVAGONZAVOD (UVZ): COMPANY OVERVIEW

9.15.2.1.2 SWOT analysis

9.15.2.1.3 Recent developments

9.15.2.1.4 MnM view

9.15.2.2 United Aircraft Corporation (UAC)

9.15.2.2.1 Business overview

TABLE 122 UNITED AIRCRAFT CORPORATION (UAC): COMPANY OVERVIEW

9.15.2.2.2 SWOT analysis

9.15.2.2.3 Recent developments

9.15.2.2.4 MnM view

9.15.2.3 United Shipbuilding Corporation (USC)

9.15.2.3.1 Business overview

TABLE 123 UNITED SHIPBUILDING CORPORATION (USC): COMPANY OVERVIEW

9.15.2.3.2 SWOT analysis

9.15.2.3.3 Recent Developments

9.15.2.3.4 MnM view

10 ITALY DEFENSE BUDGET ANALYSIS

10.1 INTRODUCTION

FIGURE 67 ITALY: DEFENSE BUDGET (2016–2022)

TABLE 124 ITALY: DEFENSE BUDGET ANALYSIS, 2019–2022 (USD BILLION)

TABLE 125 ITALY: DEFENSE BUDGET ANALYSIS, 2023–2028 (USD BILLION)

TABLE 126 ITALY: DEFENSE BUDGET ANALYSIS, BY ALLOCATION TYPE, 2019–2022 (USD BILLION)

TABLE 127 ITALY: DEFENSE BUDGET ANALYSIS, BY ALLOCATION TYPE, 2023–2028 (USD BILLION)

TABLE 128 ITALY: DEFENSE BUDGET ANALYSIS, BY DOMAIN ALLOCATION, 2019–2022 (USD BILLION)

TABLE 129 ITALY: DEFENSE BUDGET ANALYSIS, BY DOMAIN ALLOCATION, 2023–2028 (USD BILLION)

TABLE 130 ITALY: DEFENSE BUDGET ANALYSIS, BY PLATFORM ALLOCATION, 2019–2022 (USD BILLION)

TABLE 131 ITALY: DEFENSE BUDGET ANALYSIS, BY PLATFORM ALLOCATION, 2023–2028 (USD BILLION)

TABLE 132 ITALY: DEFENSE BUDGET ANALYSIS, BY SYSTEM ALLOCATION, 2019–2022 (USD BILLION)

TABLE 133 ITALY: DEFENSE BUDGET ANALYSIS, BY SYSTEM ALLOCATION, 2023–2028 (USD BILLION)

TABLE 134 ITALY: DEFENSE BUDGET ANALYSIS, BY TECHNOLOGY ALLOCATION, 2019–2022 (USD BILLION)

TABLE 135 ITALY: DEFENSE BUDGET ANALYSIS, BY TECHNOLOGY ALLOCATION, 2023–2028 (USD BILLION)

10.2 TRENDS/DISRUPTIONS IMPACTING CONTRACTOR BUSINESS

FIGURE 68 REVENUE SHIFT AND NEW REVENUE POCKETS**10.3 REGULATORY AND POLICY LANDSCAPE****10.4 IMPACT OF MEGATRENDS****10.5 TECHNOLOGY TRENDS**

10.5.1 CYBER DEFENSE

10.5.2 DIRECTED ENERGY WEAPONS

10.6 TREND INDICATORS

10.6.1 MACRO

10.6.1.1 GDP and defense budget share (%) of GDP

FIGURE 69 ITALY: DEFENSE BUDGET AS % OF GDP (2016–2022)

10.6.1.2 Geopolitical intensity/external disputes

10.6.1.3 Development index

10.6.1.4 Terrorism index

10.6.1.5 Recession impact analysis

10.6.2 MICRO

10.6.2.1 Military strength/recruitment

10.6.2.2 Military modernization

10.6.2.3 Soldier welfare

10.7 EXPORT AND IMPORT/TRADE ANALYSIS**TABLE 136 ITALY: EXPORT DATA (USD THOUSAND)****TABLE 137 ITALY: IMPORT DATA (USD THOUSAND)****10.8 DEFENSE BUDGET ANALYSIS, BY DEPARTMENTAL ALLOCATION**

10.8.1 MILITARY

10.8.1.1 Italian Army (Esercito Italiano)

10.8.1.2 Italian Navy (Marina Militare)

10.8.1.3 Italian Air Force (Aeronautica Militare)

10.8.1.4 Carabinieri

10.8.2 HOMELAND SECURITY

10.8.2.1 Ministry of Interior (Ministero dell'Interno)

10.8.2.2 State Police (Polizia di Stato)

10.8.2.3 Guardia di Finanza

10.8.2.4 Customs and Border Protection (Agenzia delle Dogane e dei Monopoli)

10.8.2.5 Civil Protection Department (Dipartimento della Protezione Civile)

10.8.2.6 Intelligence and Security Services

10.9 DEFENSE BUDGET ANALYSIS, BY PLATFORM ALLOCATION

10.9.1 LAND

FIGURE 70 ITALY: LAND FLEET (2018–2021)

10.9.2 AIRBORNE

FIGURE 71 ITALY: AIR FLEET (2018–2021)

10.9.3 NAVAL

FIGURE 72 ITALY: NAVAL FLEET (2019–2022)

10.9.4 SPACE

FIGURE 73 ITALY: SATELLITES (2018–2021)

10.9.5 CYBER

10.10 DEFENSE BUDGET ANALYSIS, BY SYSTEM ALLOCATION

10.10.1 ELECTRONICS

10.10.1.1 Intelligence, surveillance, and reconnaissance

10.10.1.2 Communication, navigation, and surveillance

10.10.1.3 Global navigation satellite system

10.10.1.4 Electronic warfare

10.10.1.5 Digital battlefield

10.10.2 ARMAMENTS

10.10.2.1 Weapons and munitions

10.10.2.2 Firearms and ammunition

TABLE 138 KEY FIREARMS USED BY ITALIAN ARMED FORCES

TABLE 139 KEY CALIBERS USED BY ITALIAN ARMED FORCES

10.11 DEFENSE BUDGET ANALYSIS, BY TECHNOLOGY ALLOCATION

10.11.1 ADVANCED

10.11.1.1 Use cases

10.11.2 CONVENTIONAL

10.11.2.1 Use cases

10.12 DEFENSE BUDGET ANALYSIS, BY DOMAIN ALLOCATION

10.12.1 MILITARY FORCES

10.12.2 SPECIAL FORCES

10.13 DEFENSE BUDGET ANALYSIS, BY ALLOCATION TYPE

10.13.1 MILITARY EXPENSE

10.13.2 ADMIN EXPENSE

10.14 DEFENSE BUDGET ANALYSIS, BY SALES OVERHEAD

10.14.1 FOREIGN MILITARY SALES

10.14.2 INDIGENOUS SALES

10.15 DEFENSE BUDGET ANALYSIS, COMPETITIVE SCENARIOS

10.15.1 COMPETITIVE LANDSCAPE

10.15.1.1 Company ranking analysis

FIGURE 74 RANKING ANALYSIS OF TOP 3 PLAYERS IN ITALY DEFENSE BUDGET ANALYSIS, 2022

10.15.1.2 Competitive benchmarking

TABLE 140 ITALY DEFENSE BUDGET ANALYSIS: COMPETITIVE BENCHMARKING

10.15.2 PRIME CONTRACTORS

10.15.2.1 Northrop Grumman Corporation

TABLE 141 NORTHROP GRUMMAN CORPORATION: COMPANY OVERVIEW

10.15.2.2 Leonardo SpA

10.15.2.2.1 Business overview

TABLE 142 LEONARDO SPA: COMPANY OVERVIEW

FIGURE 75 LEONARDO SPA: COMPANY SNAPSHOT

10.15.2.2.2 SWOT analysis

10.15.2.2.3 Recent developments

10.15.2.2.4 MnM view

10.15.2.3 Thales SA

TABLE 143 THALES SA: COMPANY OVERVIEW

11 CHINA DEFENSE BUDGET ANALYSIS

11.1 INTRODUCTION

FIGURE 76 CHINA: DEFENSE BUDGET (2016–2022)

TABLE 144 CHINA: DEFENSE BUDGET ANALYSIS, 2019–2022 (USD BILLION)

TABLE 145 CHINA: DEFENSE BUDGET ANALYSIS, 2023–2028 (USD BILLION)

TABLE 146 CHINA: DEFENSE BUDGET ANALYSIS, BY ALLOCATION TYPE,
2019–2022 (USD BILLION)TABLE 147 CHINA: DEFENSE BUDGET ANALYSIS, BY ALLOCATION TYPE,
2023–2028 (USD BILLION)TABLE 148 CHINA: DEFENSE BUDGET ANALYSIS, BY DOMAIN ALLOCATION,
2019–2022 (USD BILLION)TABLE 149 CHINA: DEFENSE BUDGET ANALYSIS, BY DOMAIN ALLOCATION,
2023–2028 (USD BILLION)TABLE 150 CHINA: DEFENSE BUDGET ANALYSIS, BY PLATFORM ALLOCATION,
2019–2022 (USD BILLION)TABLE 151 CHINA: DEFENSE BUDGET ANALYSIS, BY PLATFORM ALLOCATION,
2023–2028 (USD BILLION)TABLE 152 CHINA: DEFENSE BUDGET ANALYSIS, BY SYSTEM ALLOCATION,
2019–2022 (USD BILLION)TABLE 153 CHINA: DEFENSE BUDGET ANALYSIS, BY SYSTEM ALLOCATION,
2023–2028 (USD BILLION)TABLE 154 CHINA: DEFENSE BUDGET ANALYSIS, BY TECHNOLOGY
ALLOCATION, 2019–2022 (USD BILLION)TABLE 155 CHINA: DEFENSE BUDGET ANALYSIS, BY TECHNOLOGY
ALLOCATION, 2023–2028 (USD BILLION)

11.2 TRENDS/DISRUPTIONS IMPACTING CONTRACTOR BUSINESS

FIGURE 77 REVENUE SHIFT AND NEW REVENUE POCKETS**11.3 REGULATORY AND POLICY LANDSCAPE****11.4 IMPACT OF MEGATRENDS****11.5 TECHNOLOGY TRENDS**

11.5.1 ARTIFICIAL INTELLIGENCE

11.5.2 SWARMING MUNITIONS

11.6 TREND INDICATORS

11.6.1 MACRO

11.6.1.1 GDP and defense budget share (%) of GDP

FIGURE 78 CHINA: DEFENSE BUDGET AS % OF GDP (2016–2022)

11.6.1.2 Geopolitical intensity/external disputes

11.6.1.3 Development index

11.6.1.4 Terrorism index

11.6.1.5 Recession impact analysis

11.6.2 MICRO

11.6.2.1 Military strength/recruitment

11.6.2.2 Military modernization

11.6.2.3 Soldier welfare

11.7 EXPORT AND IMPORT/TRADE ANALYSIS**TABLE 156 CHINA: EXPORT DATA (USD THOUSAND)****TABLE 157 CHINA: IMPORT DATA (USD THOUSAND)****11.8 DEFENSE BUDGET ANALYSIS, BY DEPARTMENTAL ALLOCATION**

11.8.1 MILITARY

11.8.1.1 Central Military Commission

11.8.1.2 People's Liberation Army

11.8.1.3 Ground Force

11.8.1.4 Navy

11.8.1.5 Air Force

11.8.1.6 Rocket Force

11.8.1.7 Strategic Support Force

11.8.2 HOMELAND SECURITY

11.8.2.1 Ministry of Public Security

11.8.2.2 People's Armed Police

11.8.2.3 State Administration for Market Regulation

11.8.2.4 State Administration of Work Safety

11.8.2.5 National Administration of State Secrets Protection

11.8.2.6 Ministry of State Security

11.9 DEFENSE BUDGET ANALYSIS, BY PLATFORM ALLOCATION

11.9.1 LAND

FIGURE 79 CHINA: LAND FLEET (2018–2021)**11.9.2 AIRBORNE****FIGURE 80 CHINA: AIR FLEET (2018–2021)****11.9.3 NAVAL****FIGURE 81 CHINA: NAVAL FLEET (2019–2022)****11.9.4 SPACE****FIGURE 82 CHINA: SATELLITES (2018–2021)****11.9.5 CYBER****11.10 DEFENSE BUDGET ANALYSIS, BY SYSTEM ALLOCATION****11.10.1 ELECTRONICS**

11.10.1.1 Intelligence, surveillance, and reconnaissance

11.10.1.2 Communication, navigation, and surveillance

11.10.1.3 Global navigation satellite system

11.10.1.4 Electronic warfare

11.10.1.5 Digital battlefield

11.10.2 ARMAMENTS

11.10.2.1 Weapons and munitions

11.10.2.2 Firearms and ammunition

TABLE 158 KEY FIREARMS USED BY CHINESE ARMED FORCES**TABLE 159 KEY CALIBERS USED BY CHINESE ARMED FORCES****11.11 DEFENSE BUDGET ANALYSIS, BY TECHNOLOGY ALLOCATION****11.11.1 ADVANCED**

11.11.1.1 Use cases

11.11.2 CONVENTIONAL

11.11.2.1 Use cases

11.12 DEFENSE BUDGET ANALYSIS, BY DOMAIN ALLOCATION**11.12.1 MILITARY FORCES**

11.12.1.1 PLA Army

11.12.1.2 PLA Navy

11.12.1.3 PLA Air Force

11.12.1.4 Rocket Force

11.12.1.5 Strategic Support Force

11.12.1.6 People's Armed Police

11.12.2 SPECIAL FORCES

11.12.2.1 Special Operations Forces

11.12.2.2 Navy Marine Corps

11.12.2.3 Air Force Special Operations Forces

11.12.2.4 Reconnaissance Units

11.12.2.5 Snow Leopard Commando Unit

11.12.2.6 Night Tiger Commando Unit

11.13 DEFENSE BUDGET ANALYSIS, BY ALLOCATION TYPE

11.13.1 MILITARY EXPENSE

11.13.2 ADMIN EXPENSE

11.14 DEFENSE BUDGET ANALYSIS, BY SALES OVERHEAD

11.14.1 FOREIGN MILITARY SALES

11.14.2 INDIGENOUS SALES

11.15 DEFENSE BUDGET ANALYSIS, COMPETITIVE SCENARIOS

11.15.1 COMPETITIVE LANDSCAPE

11.15.1.1 Company ranking analysis

FIGURE 83 RANKING ANALYSIS OF TOP 3 PLAYERS IN CHINA DEFENSE BUDGET ANALYSIS, 2022

11.15.1.2 Competitive benchmarking

TABLE 160 CHINA DEFENSE BUDGET ANALYSIS: COMPETITIVE BENCHMARKING

11.15.2 PRIME CONTRACTORS

11.15.2.1 AVIC Shenyang Aircraft Co., Ltd.

11.15.2.1.1 Business overview

TABLE 161 AVIC SHENYANG AIRCRAFT CO., LTD.: COMPANY OVERVIEW

11.15.2.1.2 SWOT analysis

11.15.2.1.3 Recent developments

11.15.2.1.4 MnM view

11.15.2.2 AECC Aviation Power Co. Ltd.

11.15.2.2.1 Business overview

TABLE 162 AECC AVIATION POWER CO. LTD.: COMPANY OVERVIEW

11.15.2.2.2 SWOT analysis

11.15.2.2.3 Recent developments

11.15.2.2.4 MnM view

11.15.2.3 China CSSC Holdings Ltd.

11.15.2.3.1 Business overview

TABLE 163 CHINA CSSC HOLDINGS LTD.: COMPANY OVERVIEW

11.15.2.3.2 SWOT Analysis

11.15.2.3.3 Recent developments

11.15.2.3.4 MnM view

12 INDIA DEFENSE BUDGET ANALYSIS

12.1 INTRODUCTION

FIGURE 84 INDIA: DEFENSE BUDGET (2016–2022)

TABLE 164 INDIA: DEFENSE BUDGET ANALYSIS, 2019–2022 (USD BILLION)

TABLE 165 INDIA: DEFENSE BUDGET ANALYSIS, 2023–2028 (USD BILLION)

TABLE 166 INDIA: DEFENSE BUDGET ANALYSIS, BY ALLOCATION TYPE, 2019–2022 (USD BILLION)

TABLE 167 INDIA: DEFENSE BUDGET ANALYSIS, BY ALLOCATION TYPE, 2023–2028 (USD BILLION)

TABLE 168 INDIA: DEFENSE BUDGET ANALYSIS, BY DOMAIN ALLOCATION, 2019–2022 (USD BILLION)

TABLE 169 INDIA: DEFENSE BUDGET ANALYSIS, BY DOMAIN ALLOCATION, 2023–2028 (USD BILLION)

TABLE 170 INDIA: DEFENSE BUDGET ANALYSIS, BY PLATFORM ALLOCATION, 2019–2022 (USD BILLION)

TABLE 171 INDIA: DEFENSE BUDGET ANALYSIS, BY PLATFORM ALLOCATION, 2023–2028 (USD BILLION)

TABLE 172 INDIA: DEFENSE BUDGET ANALYSIS, BY SYSTEM ALLOCATION, 2019–2022 (USD BILLION)

TABLE 173 INDIA: DEFENSE BUDGET ANALYSIS, BY SYSTEM ALLOCATION, 2023–2028 (USD BILLION)

TABLE 174 INDIA: DEFENSE BUDGET ANALYSIS, BY TECHNOLOGY ALLOCATION, 2019–2022 (USD BILLION)

TABLE 175 INDIA: DEFENSE BUDGET ANALYSIS, BY TECHNOLOGY ALLOCATION, 2023–2028 (USD BILLION)

12.2 TRENDS/DISRUPTIONS IMPACTING CONTRACTOR BUSINESS

FIGURE 85 REVENUE SHIFT AND NEW REVENUE POCKETS

12.3 REGULATORY AND POLICY LANDSCAPE

12.4 IMPACT OF MEGATRENDS

12.5 TECHNOLOGY TRENDS

12.5.1 HYPERSONIC WEAPONS

12.5.2 ANTI-SATELLITE MISSILES

12.6 TREND INDICATORS

12.6.1 MACRO

12.6.1.1 GDP and defense budget share (%) of GDP

FIGURE 86 INDIA: DEFENSE BUDGET AS % OF GDP (2016–2022)

12.6.1.2 Geopolitical intensity/external disputes

12.6.1.3 Development index

12.6.1.4 Terrorism index

12.6.1.5 Recession impact analysis

12.6.2 MICRO

12.6.2.1 Military strength/recruitment

12.6.2.2 Military modernization

12.6.2.3 Soldier welfare

12.7 EXPORT AND IMPORT/TRADE ANALYSIS

TABLE 176 INDIA: EXPORT DATA (USD THOUSAND)

TABLE 177 INDIA: IMPORT DATA (USD THOUSAND)

12.8 DEFENSE BUDGET ANALYSIS, BY DEPARTMENTAL ALLOCATION

12.8.1 MILITARY

12.8.1.1 Ministry of Defence (MOD)

12.8.1.2 Indian Army

12.8.1.3 Indian Navy

12.8.1.4 Indian Air Force

12.8.1.5 Defence Research and Development Organization (DRDO)

12.8.1.6 Defence Acquisition Council (DAC)

12.8.1.7 Integrated Defence Staff (IDS)

12.8.2 HOMELAND SECURITY

12.8.2.1 Ministry of Home Affairs

12.8.2.2 Central Reserve Police Force

12.8.2.3 Border Security Force

12.8.2.4 Central Industrial Security Force

12.8.2.5 National Security Guard

12.8.2.6 Intelligence Bureau

12.8.2.7 National Investigation Agency

12.8.2.8 State Police Departments

12.9 DEFENSE BUDGET ANALYSIS, BY PLATFORM ALLOCATION

12.9.1 LAND

FIGURE 87 INDIA: LAND FLEET (2018–2021)

12.9.2 AIRBORNE

FIGURE 88 INDIA: AIR FLEET (2018–2021)

12.9.3 NAVAL

FIGURE 89 INDIA: NAVAL FLEET (2019–2022)

12.9.4 SPACE

FIGURE 90 INDIA: SATELLITES (2018–2021)

12.9.5 CYBER

12.10 DEFENSE BUDGET ANALYSIS, BY SYSTEM ALLOCATION

12.10.1 ELECTRONICS

12.10.1.1 Intelligence, surveillance, and reconnaissance

12.10.1.2 Communication, navigation, and surveillance

12.10.1.3 Global navigation satellite system

12.10.1.4 Electronic warfare

12.10.1.5 Digital battlefield

12.10.2 ARMAMENTS

12.10.2.1 Weapons and munitions

12.10.2.2 Firearms and ammunition

TABLE 178 KEY FIREARMS USED BY INDIAN ARMED FORCES

TABLE 179 KEY CALIBERS USED BY INDIAN ARMED FORCES

12.11 DEFENSE BUDGET ANALYSIS, BY TECHNOLOGY ALLOCATION

12.11.1 ADVANCED

12.11.1.1 Use cases

12.11.2 CONVENTIONAL

12.11.2.1 Use cases

12.12 DEFENSE BUDGET ANALYSIS, BY DOMAIN ALLOCATION

12.12.1 MILITARY FORCES

12.12.1.1 Indian Army

12.12.1.2 Indian Navy

12.12.1.3 Indian Air Force

12.12.1.4 Indian Coast Guard

12.12.2 SPECIAL FORCES

12.12.2.1 Para

12.12.2.2 MARCOS

12.12.2.3 Garud Commando Force

12.12.2.4 National Security Guard

12.13 DEFENSE BUDGET ANALYSIS, BY ALLOCATION TYPE

12.13.1 MILITARY EXPENSE

12.13.2 ADMIN EXPENSE

12.14 DEFENSE BUDGET ANALYSIS, BY SALES OVERHEAD

12.14.1 FOREIGN MILITARY SALES

12.14.2 INDIGENOUS SALES

12.15 DEFENSE BUDGET ANALYSIS, COMPETITIVE SCENARIOS

12.15.1 COMPETITIVE LANDSCAPE

12.15.1.1 Company ranking analysis

FIGURE 91 RANKING ANALYSIS OF TOP 3 PLAYERS IN INDIA DEFENSE BUDGET ANALYSIS, 2022

12.15.1.2 Competitive benchmarking

TABLE 180 INDIA DEFENSE BUDGET ANALYSIS: COMPETITIVE BENCHMARKING

12.15.2 PRIME CONTRACTORS

12.15.2.1 Bharat Dynamics Ltd.

12.15.2.1.1 Business overview

TABLE 181 BHARAT DYNAMICS LTD.: COMPANY OVERVIEW

FIGURE 92 BHARAT DYNAMICS LTD.: COMPANY SNAPSHOT

- 12.15.2.1.2 SWOT analysis
- 12.15.2.1.3 Recent developments
- 12.15.2.1.4 MnM view

12.15.2.2 Bharat Electronics Ltd.

- 12.15.2.2.1 Business overview

TABLE 182 BHARAT ELECTRONICS LTD.: COMPANY OVERVIEW

FIGURE 93 BHARAT ELECTRONICS LTD.: COMPANY SNAPSHOT

- 12.15.2.2.2 SWOT analysis
- 12.15.2.2.3 Recent developments
- 12.15.2.2.4 MnM view

12.15.2.3 Hindustan Aeronautics Ltd.

- 12.15.2.3.1 Business overview

TABLE 183 HINDUSTAN AERONAUTICS LTD.: COMPANY OVERVIEW

FIGURE 94 HINDUSTAN AERONAUTICS LTD.: COMPANY SNAPSHOT

- 12.15.2.3.2 SWOT analysis
- 12.15.2.3.3 Recent developments
- 12.15.2.3.4 MnM view

13 JAPAN DEFENSE BUDGET ANALYSIS

13.1 INTRODUCTION

FIGURE 95 JAPAN: DEFENSE BUDGET (2016–2022)

TABLE 184 JAPAN: DEFENSE BUDGET ANALYSIS, 2019–2022 (USD BILLION)

TABLE 185 JAPAN: DEFENSE BUDGET ANALYSIS, 2023–2028 (USD BILLION)

TABLE 186 JAPAN: DEFENSE BUDGET ANALYSIS, BY ALLOCATION TYPE, 2019–2022 (USD BILLION)

TABLE 187 JAPAN: DEFENSE BUDGET ANALYSIS, BY ALLOCATION TYPE, 2023–2028 (USD BILLION)

TABLE 188 JAPAN: DEFENSE BUDGET ANALYSIS, BY DOMAIN ALLOCATION, 2019–2022 (USD BILLION)

TABLE 189 JAPAN: DEFENSE BUDGET ANALYSIS, BY DOMAIN ALLOCATION, 2023–2028 (USD BILLION)

TABLE 190 JAPAN: DEFENSE BUDGET ANALYSIS, BY PLATFORM ALLOCATION, 2019–2022 (USD BILLION)

TABLE 191 JAPAN: DEFENSE BUDGET ANALYSIS, BY PLATFORM ALLOCATION, 2023–2028 (USD BILLION)

TABLE 192 JAPAN: DEFENSE BUDGET ANALYSIS, BY SYSTEM ALLOCATION, 2019–2022 (USD BILLION)

TABLE 193 JAPAN: DEFENSE BUDGET ANALYSIS, BY SYSTEM ALLOCATION,

2023–2028 (USD BILLION)

TABLE 194 JAPAN: DEFENSE BUDGET ANALYSIS, BY TECHNOLOGY ALLOCATION, 2019–2022 (USD BILLION)

TABLE 195 JAPAN: DEFENSE BUDGET ANALYSIS, BY TECHNOLOGY ALLOCATION, 2023–2028 (USD BILLION)

13.2 TRENDS/DISRUPTIONS IMPACTING CONTRACTOR BUSINESS

FIGURE 96 REVENUE SHIFT AND NEW REVENUE POCKETS

13.3 REGULATORY AND POLICY LANDSCAPE

13.4 IMPACT OF MEGATRENDS

13.5 TECHNOLOGY TRENDS

13.5.1 LONG-RANGE MISSILES

13.5.2 HIGH-POWER MICROWAVE

13.6 TREND INDICATORS

13.6.1 MACRO

13.6.1.1 GDP and defense budget share (%) of GDP

FIGURE 97 JAPAN: DEFENSE BUDGET AS % OF GDP (2016–2022)

13.6.1.2 Geopolitical intensity/external disputes

13.6.1.3 Development index

13.6.1.4 Terrorism index

13.6.1.5 Recession impact analysis

13.6.2 MICRO

13.6.2.1 Military strength/recruitment

13.6.2.2 Military modernization

13.6.2.3 Soldier welfare

13.7 EXPORT AND IMPORT/TRADE ANALYSIS

TABLE 196 JAPAN: EXPORT DATA (USD THOUSAND)

TABLE 197 JAPAN: IMPORT DATA (USD THOUSAND)

13.8 DEFENSE BUDGET ANALYSIS, BY DEPARTMENTAL ALLOCATION

13.8.1 MILITARY

13.8.1.1 Ministry of Defense

13.8.1.2 Defense Agency

13.8.1.3 Self-Defense Forces

13.8.1.4 National Security Council

13.8.1.5 National Defense Council

13.8.2 HOMELAND SECURITY

13.8.2.1 Ground Self-Defense Force

13.8.2.2 Maritime Self-Defense Force

13.8.2.3 Air Self-Defense Force

13.9 DEFENSE BUDGET ANALYSIS, BY PLATFORM ALLOCATION

13.9.1 LAND

FIGURE 98 JAPAN: LAND FLEET (2018–2021)

13.9.2 AIRBORNE

FIGURE 99 JAPAN: AIR FLEET (2018–2021)

13.9.3 NAVAL

FIGURE 100 JAPAN: NAVAL FLEET (2019–2022)

13.9.4 SPACE

FIGURE 101 JAPAN: SATELLITES (2018–2021)

13.9.5 CYBER

13.10 DEFENSE BUDGET ANALYSIS, BY SYSTEM ALLOCATION

13.10.1 ELECTRONICS

13.10.1.1 Intelligence, surveillance, and reconnaissance

13.10.1.2 Communication, navigation, and surveillance

13.10.1.3 Global navigation satellite system

13.10.1.4 Electronic warfare

13.10.1.5 Digital battlefield

13.10.2 ARMAMENTS

13.10.2.1 Weapons and munitions

13.10.2.2 Firearms and ammunition

TABLE 198 KEY FIREARMS USED BY JAPANESE ARMED FORCES

TABLE 199 KEY CALIBERS USED BY JAPANESE ARMED FORCES

13.11 DEFENSE BUDGET ANALYSIS, BY TECHNOLOGY ALLOCATION

13.11.1 ADVANCED

13.11.1.1 Use cases

13.11.2 CONVENTIONAL

13.11.2.1 Use cases

13.12 DEFENSE BUDGET ANALYSIS, BY DOMAIN ALLOCATION

13.12.1 MILITARY FORCES

13.12.2 SPECIAL FORCES

13.13 DEFENSE BUDGET ANALYSIS, BY ALLOCATION TYPE

13.13.1 MILITARY EXPENSES

13.13.2 ADMIN EXPENSES

13.14 DEFENSE BUDGET ANALYSIS, BY SALES OVERHEAD

13.14.1 FOREIGN MILITARY SALES

13.14.2 INDIGENOUS SALES

13.15 DEFENSE BUDGET ANALYSIS, COMPETITIVE SCENARIOS

13.15.1 COMPETITIVE LANDSCAPE

13.15.1.1 Company ranking analysis

FIGURE 102 RANKING ANALYSIS OF TOP 3 PLAYERS IN JAPAN DEFENSE

BUDGET ANALYSIS, 2022

13.15.1.2 Competitive benchmarking

TABLE 200 JAPAN DEFENSE BUDGET ANALYSIS: COMPETITIVE BENCHMARKING**13.15.2 PRIME CONTRACTORS**

13.15.2.1 Kawasaki Heavy Industries, Ltd.

13.15.2.1.1 Business overview

TABLE 201 KAWASAKI HEAVY INDUSTRIES, LTD.: COMPANY OVERVIEW**FIGURE 103 KAWASAKI HEAVY INDUSTRIES, LTD.: COMPANY SNAPSHOT**

13.15.2.1.2 SWOT analysis

13.15.2.1.3 Recent developments

13.15.2.1.4 MnM view

13.15.2.2 Mitsubishi Heavy Industries, Ltd.

13.15.2.2.1 Business overview

TABLE 202 MITSUBISHI HEAVY INDUSTRIES, LTD.: COMPANY OVERVIEW

13.15.2.2.2 SWOT analysis

13.15.2.2.3 Recent developments

13.15.2.2.4 MnM view

13.15.2.3 NEC Corporation

13.15.2.3.1 Business overview

TABLE 203 NEC CORPORATION: COMPANY OVERVIEW

13.15.2.3.2 SWOT analysis

13.15.2.3.3 Recent developments

13.15.2.3.4 MnM view

14 SOUTH KOREA DEFENSE BUDGET ANALYSIS**14.1 INTRODUCTION****FIGURE 104 SOUTH KOREA: DEFENSE BUDGET (2016–2022)****TABLE 204 SOUTH KOREA: DEFENSE BUDGET ANALYSIS, 2019–2022 (USD BILLION)****TABLE 205 SOUTH KOREA: DEFENSE BUDGET ANALYSIS, 2023–2028 (USD BILLION)****TABLE 206 SOUTH KOREA: DEFENSE BUDGET ANALYSIS, BY ALLOCATION TYPE, 2019–2022 (USD BILLION)****TABLE 207 SOUTH KOREA: DEFENSE BUDGET ANALYSIS, BY ALLOCATION TYPE, 2023–2028 (USD BILLION)****TABLE 208 SOUTH KOREA: DEFENSE BUDGET ANALYSIS, BY DOMAIN ALLOCATION, 2019–2022 (USD BILLION)**

- TABLE 209 SOUTH KOREA: DEFENSE BUDGET ANALYSIS, BY DOMAIN ALLOCATION, 2023–2028 (USD BILLION)
- TABLE 210 SOUTH KOREA: DEFENSE BUDGET ANALYSIS, BY PLATFORM ALLOCATION, 2019–2022 (USD BILLION)
- TABLE 211 SOUTH KOREA: DEFENSE BUDGET ANALYSIS, BY PLATFORM ALLOCATION, 2023–2028 (USD BILLION)
- TABLE 212 SOUTH KOREA: DEFENSE BUDGET ANALYSIS, BY SYSTEM ALLOCATION, 2019–2022 (USD BILLION)
- TABLE 213 SOUTH KOREA: DEFENSE BUDGET ANALYSIS, BY SYSTEM ALLOCATION, 2023–2028 (USD BILLION)
- TABLE 214 SOUTH KOREA: DEFENSE BUDGET ANALYSIS, BY TECHNOLOGY ALLOCATION, 2019–2022 (USD BILLION)
- TABLE 215 SOUTH KOREA: DEFENSE BUDGET ANALYSIS, BY TECHNOLOGY ALLOCATION, 2023–2028 (USD BILLION)
- 14.2 TRENDS/DISRUPTIONS IMPACTING CONTRACTOR BUSINESS
 - FIGURE 105 REVENUE SHIFT AND NEW REVENUE POCKETS
- 14.3 REGULATORY AND POLICY LANDSCAPE
- 14.4 IMPACT OF MEGATRENDS
- 14.5 TECHNOLOGY TRENDS
 - 14.5.1 HYPERSONIC PROPULSION PLATFORMS
 - 14.5.2 INTERMEDIATE-RANGE BALLISTIC MISSILES
- 14.6 TREND INDICATORS
 - 14.6.1 MACRO
 - 14.6.1.1 GDP and defense budget share (%) of GDP
 - FIGURE 106 SOUTH KOREA: DEFENSE BUDGET AS % OF GDP (2016–2022)
 - 14.6.1.2 Geopolitical intensity/external disputes
 - 14.6.1.3 Development index
 - 14.6.1.4 Terrorism index
 - 14.6.1.5 Recession impact analysis
 - 14.6.2 MICRO
 - 14.6.2.1 Military strength/recruitment
 - 14.6.2.2 Military modernization
 - 14.6.2.3 Soldier welfare
- 14.7 EXPORT AND IMPORT/TRADE ANALYSIS
- TABLE 216 SOUTH KOREA: EXPORT DATA (USD THOUSAND)
- TABLE 217 SOUTH KOREA: IMPORT DATA (USD THOUSAND)
- 14.8 DEFENSE BUDGET ANALYSIS, BY DEPARTMENTAL ALLOCATION
 - 14.8.1 MILITARY
 - 14.8.1.1 Republic of Korea Army

- 14.8.1.2 Republic of Korea Navy
- 14.8.1.3 Republic of Korea Air Force
- 14.8.1.4 Republic of Korea Marine Corps
- 14.8.1.5 Defense Acquisition Program Administration
- 14.8.1.6 Joint Chiefs of Staff
- 14.8.2 HOMELAND SECURITY
 - 14.8.2.1 Ministry of Interior and Safety
 - 14.8.2.2 National Police Agency
 - 14.8.2.3 Korea Coast Guard (KCG)
 - 14.8.2.4 National Intelligence Service
 - 14.8.2.5 Ministry of National Defense
- 14.9 DEFENSE BUDGET ANALYSIS, BY PLATFORM ALLOCATION
 - 14.9.1 LAND
 - FIGURE 107 SOUTH KOREA: LAND FLEET (2018–2021)
 - 14.9.2 AIRBORNE
 - FIGURE 108 SOUTH KOREA: AIR FLEET (2018–2021)
 - 14.9.3 NAVAL
 - FIGURE 109 SOUTH KOREA: NAVAL FLEET (2019–2022)
 - 14.9.4 SPACE
 - FIGURE 110 SOUTH KOREA: SATELLITES (2018–2021)
 - 14.9.5 CYBER
- 14.10 DEFENSE BUDGET ANALYSIS, BY SYSTEM ALLOCATION
 - 14.10.1 ELECTRONICS
 - 14.10.1.1 Intelligence, surveillance, and reconnaissance
 - 14.10.1.2 Communication, navigation, and surveillance
 - 14.10.1.3 Global navigation satellite system
 - 14.10.1.4 Electronic warfare
 - 14.10.1.5 Digital battlefield
 - 14.10.2 ARMAMENTS
 - 14.10.2.1 Weapons and munitions
 - 14.10.2.2 Firearms and ammunition
- TABLE 218 KEY FIREARMS USED BY SOUTH KOREAN ARMED FORCES
- TABLE 219 KEY CALIBERS USED BY SOUTH KOREAN ARMED FORCES
- 14.11 DEFENSE BUDGET ANALYSIS, BY TECHNOLOGY ALLOCATION
 - 14.11.1 ADVANCED
 - 14.11.1.1 Use cases
 - 14.11.2 CONVENTIONAL
 - 14.11.2.1 Use cases
- 14.12 DEFENSE BUDGET ANALYSIS, BY DOMAIN ALLOCATION

- 14.12.1 MILITARY FORCES
- 14.12.2 SPECIAL FORCES
- 14.13 DEFENSE BUDGET ANALYSIS, BY ALLOCATION TYPE
 - 14.13.1 MILITARY EXPENSE
 - 14.13.2 ADMIN EXPENSE
- 14.14 DEFENSE BUDGET ANALYSIS, BY SALES OVERHEAD
 - 14.14.1 FOREIGN MILITARY SALES
 - 14.14.2 INDIGENOUS SALES
- 14.15 DEFENSE BUDGET ANALYSIS, COMPETITIVE SCENARIOS
 - 14.15.1 COMPETITIVE LANDSCAPE
 - 14.15.1.1 Company ranking analysis
 - FIGURE 111 RANKING ANALYSIS OF TOP 3 PLAYERS IN SOUTH KOREA DEFENSE BUDGET ANALYSIS, 2022
 - 14.15.1.2 Competitive benchmarking
 - TABLE 220 SOUTH KOREA DEFENSE BUDGET ANALYSIS: COMPETITIVE BENCHMARKING
 - 14.15.2 PRIME CONTRACTORS
 - 14.15.2.1 Hyundai Rotem Co
 - 14.15.2.1.1 Business overview
 - TABLE 221 HYUNDAI ROTEM CO: COMPANY OVERVIEW
 - 14.15.2.1.2 SWOT analysis
 - 14.15.2.1.3 Recent developments
 - 14.15.2.1.4 MnM view
 - 14.15.2.2 Hanwha Corporation
 - 14.15.2.2.1 Business overview
 - TABLE 222 HANWHA CORPORATION: COMPANY OVERVIEW
 - 14.15.2.2.2 SWOT analysis
 - 14.15.2.2.3 Recent developments
 - 14.15.2.2.4 MnM view
 - 14.15.2.3 Korea Aerospace Industries Ltd. (KAI)
 - 14.15.2.3.1 Business overview
 - TABLE 223 KOREA AEROSPACE INDUSTRIES LTD. (KAI): COMPANY OVERVIEW
 - 14.15.2.3.2 SWOT analysis
 - 14.15.2.3.3 Recent developments
 - 14.15.2.3.4 MnM view

15 AUSTRALIA DEFENSE BUDGET ANALYSIS

15.1 INTRODUCTION

FIGURE 112 AUSTRALIA: DEFENSE BUDGET (2016?2022)

TABLE 224 AUSTRALIA: DEFENSE BUDGET ANALYSIS, 2019–2022 (USD BILLION)

TABLE 225 AUSTRALIA: DEFENSE BUDGET ANALYSIS, 2023–2028 (USD BILLION)

TABLE 226 AUSTRALIA: DEFENSE BUDGET ANALYSIS, BY ALLOCATION TYPE, 2019–2022 (USD BILLION)

TABLE 227 AUSTRALIA: DEFENSE BUDGET ANALYSIS, BY ALLOCATION TYPE, 2023–2028 (USD BILLION)

TABLE 228 AUSTRALIA: DEFENSE BUDGET ANALYSIS, BY DOMAIN ALLOCATION, 2019–2022 (USD BILLION)

TABLE 229 AUSTRALIA: DEFENSE BUDGET ANALYSIS, BY DOMAIN ALLOCATION, 2023–2028 (USD BILLION)

TABLE 230 AUSTRALIA: DEFENSE BUDGET ANALYSIS, BY PLATFORM ALLOCATION, 2019–2022 (USD BILLION)

TABLE 231 AUSTRALIA: DEFENSE BUDGET ANALYSIS, BY PLATFORM ALLOCATION, 2023–2028 (USD BILLION)

TABLE 232 AUSTRALIA: DEFENSE BUDGET ANALYSIS, BY SYSTEM ALLOCATION, 2019–2022 (USD BILLION)

TABLE 233 AUSTRALIA: DEFENSE BUDGET ANALYSIS, BY SYSTEM ALLOCATION, 2023–2028 (USD BILLION)

TABLE 234 AUSTRALIA: DEFENSE BUDGET ANALYSIS, BY TECHNOLOGY ALLOCATION, 2019–2022 (USD BILLION)

TABLE 235 AUSTRALIA: DEFENSE BUDGET ANALYSIS, BY TECHNOLOGY ALLOCATION, 2023–2028 (USD BILLION)

15.2 TRENDS/DISRUPTIONS IMPACTING CONTRACTOR BUSINESS

FIGURE 113 REVENUE SHIFT AND NEW REVENUE POCKETS

15.3 REGULATORY AND POLICY LANDSCAPE

15.4 IMPACT OF MEGATRENDS

15.5 TECHNOLOGY TRENDS

15.5.1 SENSORS AND ANALYTICS

15.5.2 AUGMENTED REALITY AND VIRTUAL REALITY

15.6 TREND INDICATORS

15.6.1 MACRO

15.6.1.1 GDP and defense budget share (%) of GDP

FIGURE 114 AUSTRALIA: DEFENSE BUDGET AS % OF GDP (2016?2022)

15.6.1.2 Geopolitical intensity/external disputes

15.6.1.3 Development index

15.6.1.4 Terrorism index

15.6.1.5 Recession impact analysis

15.6.2 MICRO

15.6.2.1 Military strength/recruitment

15.6.2.2 Military modernization

15.6.2.3 Soldier welfare

15.7 EXPORT AND IMPORT/TRADE ANALYSIS

TABLE 236 AUSTRALIA: EXPORT DATA (USD THOUSAND)

TABLE 237 AUSTRALIA: IMPORT DATA (USD THOUSAND)

15.8 DEFENSE BUDGET ANALYSIS, BY DEPARTMENTAL ALLOCATION

15.8.1 MILITARY

15.8.1.1 Department of Defense

15.8.1.2 Australian Defense Force

15.8.1.3 Australian Army

15.8.1.4 Royal Australian Navy

15.8.1.5 Royal Australian Air Force

15.8.1.6 Defense Science and Technology Group

15.8.1.7 Defense Materiel Organization

15.8.2 HOMELAND SECURITY

15.8.2.1 Department of Home Affairs

15.8.2.2 Australian Federal Police

15.8.2.3 Australian Security Intelligence Organization

15.8.2.4 Australian Border Force

15.8.2.5 Australian Security and Intelligence Review Agency

15.8.2.6 State and Territory Police Forces

15.9 DEFENSE BUDGET ANALYSIS, BY PLATFORM ALLOCATION

15.9.1 LAND

FIGURE 115 AUSTRALIA: LAND FLEET (2018?2021)

15.9.2 AIRBORNE

FIGURE 116 AUSTRALIA: AIR FLEET (2018?2021)

15.9.3 NAVAL

FIGURE 117 AUSTRALIA: NAVAL FLEET (2019–2022)

15.9.4 SPACE

FIGURE 118 AUSTRALIA: SATELLITES (2018?2021)

15.9.5 CYBER

15.10 DEFENSE BUDGET ANALYSIS, SYSTEM ALLOCATION

15.10.1 ELECTRONICS

15.10.1.1 Intelligence, surveillance, and reconnaissance

15.10.1.2 Communication, navigation, and surveillance

15.10.1.3 Global navigation satellite system

15.10.1.4 Electronic warfare

15.10.1.5 Digital battlefield

15.10.2 ARMAMENTS

15.10.2.1 Weapons and munitions

15.10.2.2 Firearms and ammunition

TABLE 238 KEY FIREARMS USED BY AUSTRALIAN ARMED FORCES

TABLE 239 KEY CALIBERS USED BY AUSTRALIAN ARMED FORCES

15.11 DEFENSE BUDGET ANALYSIS, TECHNOLOGY ALLOCATION

15.11.1 ADVANCED

15.11.1.1 Use cases

15.11.2 CONVENTIONAL

15.11.2.1 Use cases

15.12 DEFENSE BUDGET ANALYSIS, DOMAIN ALLOCATION

15.12.1 MILITARY FORCES

15.12.1.1 Australian Army

15.12.1.2 Royal Australian Navy

15.12.1.3 Royal Australian Air Force

15.12.2 SPECIAL FORCES

15.12.2.1 Special Air Service Regiment

15.12.2.2 2nd Commando Regiment

15.12.2.3 Incident Response Regiment

15.12.2.4 Tactical Assault Group (East and West)

15.13 DEFENSE BUDGET ANALYSIS, BY ALLOCATION TYPE

15.13.1 MILITARY EXPENSE

15.13.2 ADMIN EXPENSE

15.14 DEFENSE BUDGET ANALYSIS, BY SALES OVERHEAD

15.14.1 FOREIGN MILITARY SAL

15.14.2 INDIGENOUS SALES

15.15 DEFENSE BUDGET ANALYSIS, COMPETITIVE SCENARIOS

15.15.1 COMPETITIVE LANDSCAPE

15.15.1.1 Company ranking analysis

FIGURE 119 RANKING ANALYSIS OF TOP THREE PLAYERS IN AUSTRALIA

DEFENSE BUDGET ANALYSIS, 2022

15.15.1.2 Competitive benchmarking

TABLE 240 AUSTRALIA DEFENSE BUDGET ANALYSIS: COMPETITIVE BENCHMARKING

15.15.2 PRIME CONTRACTORS

15.15.2.1 BAE Systems Australia Ltd.

15.15.2.1.1 Business overview

TABLE 241 BAE SYSTEMS AUSTRALIA LTD.: COMPANY OVERVIEW

FIGURE 120 BAE SYSTEMS AUSTRALIA LTD.: COMPANY SNAPSHOT

- 15.15.2.1.2 SWOT analysis
- 15.15.2.1.3 Recent developments
- 15.15.2.1.4 MnM view

15.15.2.2 Lockheed Martin Corporation

TABLE 242 LOCKHEED MARTIN CORPORATION: COMPANY OVERVIEW

15.15.2.3 Thales SA

TABLE 243 THALES SA: COMPANY OVERVIEW

16 SAUDI ARABIA DEFENSE BUDGET ANALYSIS

16.1 INTRODUCTION

FIGURE 121 SAUDI ARABIA: DEFENSE BUDGET (2016?2022)

TABLE 244 SAUDI ARABIA: DEFENSE BUDGET ANALYSIS, 2019–2022 (USD BILLION)

TABLE 245 SAUDI ARABIA: DEFENSE BUDGET ANALYSIS, 2023–2028 (USD BILLION)

TABLE 246 SAUDI ARABIA: DEFENSE BUDGET ANALYSIS, BY ALLOCATION TYPE, 2019–2022 (USD BILLION)

TABLE 247 SAUDI ARABIA: DEFENSE BUDGET ANALYSIS, BY ALLOCATION TYPE, 2023–2028 (USD BILLION)

TABLE 248 SAUDI ARABIA: DEFENSE BUDGET ANALYSIS, BY DOMAIN ALLOCATION, 2019–2022 (USD BILLION)

TABLE 249 SAUDI ARABIA: DEFENSE BUDGET ANALYSIS, BY DOMAIN ALLOCATION, 2023–2028 (USD BILLION)

TABLE 250 SAUDI ARABIA: DEFENSE BUDGET ANALYSIS, BY PLATFORM ALLOCATION, 2019–2022 (USD BILLION)

TABLE 251 SAUDI ARABIA: DEFENSE BUDGET ANALYSIS, BY PLATFORM ALLOCATION, 2023–2028 (USD BILLION)

TABLE 252 SAUDI ARABIA: DEFENSE BUDGET ANALYSIS, BY SYSTEM ALLOCATION, 2019–2022 (USD BILLION)

TABLE 253 SAUDI ARABIA: DEFENSE BUDGET ANALYSIS, BY SYSTEM ALLOCATION, 2023–2028 (USD BILLION)

TABLE 254 SAUDI ARABIA: DEFENSE BUDGET ANALYSIS, BY TECHNOLOGY ALLOCATION, 2019–2022 (USD BILLION)

TABLE 255 SAUDI ARABIA: DEFENSE BUDGET ANALYSIS, BY TECHNOLOGY ALLOCATION, 2023–2028 (USD BILLION)

16.2 TRENDS/DISRUPTIONS IMPACTING CONTRACTOR BUSINESS

FIGURE 122 REVENUE SHIFT AND NEW REVENUE POCKETS

16.3 REGULATORY AND POLICY LANDSCAPE

16.4 IMPACT OF MEGATRENDS

16.5 TECHNOLOGY TRENDS

16.5.1 DIRECTED ENERGY WEAPONS

16.6 TREND INDICATORS

16.6.1 MACRO

16.6.1.1 GDP and defense budget share (%) of GDP

FIGURE 123 SAUDI ARABIA: DEFENSE BUDGET AS % OF GDP (2016-2022)

16.6.1.2 Geopolitical intensity/external disputes

16.6.1.3 Development index

16.6.1.4 Terrorism index

16.6.1.5 Recession impact analysis

16.6.2 MICRO

16.6.2.1 Military strength/recruitment

16.6.2.2 Military modernization

16.6.2.3 Soldier welfare

16.7 EXPORT AND IMPORT/TRADE ANALYSIS

16.8 DEFENSE BUDGET ANALYSIS, BY DEPARTMENTAL ALLOCATION

16.8.1 MILITARY

16.8.1.1 Royal Saudi Land Forces

16.8.1.2 Royal Saudi Naval Forces

16.8.1.3 Royal Saudi Air Defense Forces

16.8.1.4 Royal Saudi Air Force

16.8.1.5 Royal Saudi Strategic Missile Force

16.8.1.6 Saudi Arabian National Guard

16.8.2 HOMELAND SECURITY

16.8.2.1 Ministry of Interior

16.8.2.2 General Directorate of Public Security

16.8.2.3 General Directorate of Border Guards

16.8.2.4 General Directorate of Civil Defense

16.8.2.5 General Directorate of Prisons

16.9 DEFENSE BUDGET ANALYSIS, BY PLATFORM ALLOCATION

16.9.1 LAND

FIGURE 124 SAUDI ARABIA: LAND FLEET (2018-2021)

16.9.2 AIRBORNE

FIGURE 125 SAUDI ARABIA: AIR FLEET (2018-2021)

16.9.3 NAVAL

FIGURE 126 SAUDI ARABIA: NAVAL FLEET (2019-2022)

16.9.4 SPACE

FIGURE 127 SAUDI ARABIA: SATELLITES (2018-2021)

- 16.9.5 CYBER
- 16.10 DEFENSE BUDGET ANALYSIS, BY SYSTEM ALLOCATION
 - 16.10.1 ELECTRONICS
 - 16.10.1.1 Intelligence, surveillance, and reconnaissance
 - 16.10.1.2 Communication, navigation, and surveillance
 - 16.10.1.3 Global navigation satellite system
 - 16.10.1.4 Electronic warfare
 - 16.10.1.5 Digital battlefield
 - 16.10.2 ARMAMENTS
 - 16.10.2.1 Weapons and munitions
 - 16.10.2.2 Firearms and ammunition
- TABLE 256 KEY FIREARMS USED BY SAUDI ARABIAN ARMED FORCES
- TABLE 257 KEY CALIBERS USED BY SAUDI ARABIAN ARMED FORCES
- 16.11 DEFENSE BUDGET ANALYSIS, BY TECHNOLOGY ALLOCATION
 - 16.11.1 ADVANCED
 - 16.11.1.1 Use cases
 - 16.11.2 CONVENTIONAL
 - 16.11.2.1 Use cases
- 16.12 DEFENSE BUDGET ANALYSIS, BY DOMAIN ALLOCATION
 - 16.12.1 MILITARY FORCES
 - 16.12.2 SPECIAL FORCES
- 16.13 DEFENSE BUDGET ANALYSIS, BY ALLOCATION TYPE
 - 16.13.1 MILITARY EXPENSE
 - 16.13.2 ADMIN EXPENSE
- 16.14 DEFENSE BUDGET ANALYSIS, BY SALES OVERHEAD
 - 16.14.1 FOREIGN MILITARY SALES
 - 16.14.2 INDIGENOUS SALES
- 16.15 DEFENSE BUDGET ANALYSIS, COMPETITIVE SCENARIOS
 - 16.15.1 COMPETITIVE LANDSCAPE
 - 16.15.1.1 Company ranking analysis
 - FIGURE 128 RANKING ANALYSIS OF TOP 3 PLAYERS IN SAUDI ARABIA DEFENSE BUDGET ANALYSIS, 2022
 - 16.15.1.2 Competitive benchmarking
 - TABLE 258 SAUDI ARABIA DEFENSE BUDGET ANALYSIS: COMPETITIVE BENCHMARKING
 - 16.15.2 PRIME CONTRACTORS
 - 16.15.2.1 Lockheed Martin Corporation
 - TABLE 259 LOCKHEED MARTIN CORPORATION: COMPANY OVERVIEW
 - 16.15.2.2 The Boeing Company

16.15.2.2.1 Business overview

TABLE 260 THE BOEING COMPANY: COMPANY OVERVIEW

FIGURE 129 THE BOEING COMPANY: COMPANY SNAPSHOT

16.15.2.2.2 SWOT analysis

16.15.2.2.3 Recent developments

16.15.2.2.4 MnM view

16.15.2.3 BAE Systems plc

TABLE 261 BAE SYSTEMS PLC: COMPANY OVERVIEW

17 ISRAEL DEFENSE BUDGET ANALYSIS

17.1 INTRODUCTION

FIGURE 130 ISRAEL: DEFENSE BUDGET (2016–2022)

TABLE 262 ISRAEL: DEFENSE BUDGET ANALYSIS, 2019–2022 (USD BILLION)

TABLE 263 ISRAEL: DEFENSE BUDGET ANALYSIS, 2023–2028 (USD BILLION)

TABLE 264 ISRAEL: DEFENSE BUDGET ANALYSIS, BY ALLOCATION TYPE,
2019–2022 (USD BILLION)TABLE 265 ISRAEL: DEFENSE BUDGET ANALYSIS, BY ALLOCATION TYPE,
2023–2028 (USD BILLION)TABLE 266 ISRAEL: DEFENSE BUDGET ANALYSIS, BY DOMAIN ALLOCATION,
2019–2022 (USD BILLION)TABLE 267 ISRAEL: DEFENSE BUDGET ANALYSIS, BY DOMAIN ALLOCATION,
2023–2028 (USD BILLION)TABLE 268 ISRAEL: DEFENSE BUDGET ANALYSIS, BY PLATFORM ALLOCATION,
2019–2022 (USD BILLION)TABLE 269 ISRAEL: DEFENSE BUDGET ANALYSIS, BY PLATFORM ALLOCATION,
2023–2028 (USD BILLION)TABLE 270 ISRAEL: DEFENSE BUDGET ANALYSIS, BY SYSTEM ALLOCATION,
2019–2022 (USD BILLION)TABLE 271 ISRAEL: DEFENSE BUDGET ANALYSIS, BY SYSTEM ALLOCATION,
2023–2028 (USD BILLION)TABLE 272 ISRAEL: DEFENSE BUDGET ANALYSIS, BY TECHNOLOGY
ALLOCATION, 2019–2022 (USD BILLION)TABLE 273 ISRAEL: DEFENSE BUDGET ANALYSIS, BY TECHNOLOGY
ALLOCATION, 2023–2028 (USD BILLION)

17.2 TRENDS/DISRUPTIONS IMPACTING CONTRACTOR BUSINESS

FIGURE 131 REVENUE SHIFT AND NEW REVENUE POCKETS

17.3 REGULATORY AND POLICY LANDSCAPE

17.4 IMPACT OF MEGATRENDS

17.5 TECHNOLOGY TRENDS

17.5.1 MICRO-SUICIDE DRONE SWARMS

17.5.2 ROCKET ARTILLERY SYSTEMS

17.6 TREND INDICATORS

17.6.1 MACRO

17.6.1.1 GDP and defense budget share (%) of GDP

FIGURE 132 ISRAEL: DEFENSE BUDGET AS % OF GDP (2016–2022)

17.6.1.2 Geopolitical intensity/external disputes

17.6.1.3 Development index

17.6.1.4 Terrorism index

17.6.1.5 Recession impact analysis

17.6.2 MICRO

17.6.2.1 Military strength/recruitment

17.6.2.2 Military modernization

17.6.2.3 Soldier welfare

17.7 EXPORT AND IMPORT/TRADE ANALYSIS

17.8 DEFENSE BUDGET ANALYSIS, BY DEPARTMENTAL ALLOCATION

17.8.1 MILITARY

17.8.1.1 Israeli Army

17.8.1.2 Israeli Air Force

17.8.1.3 Israeli Navy

17.8.1.4 Intelligence Directorate (Aman)

17.8.1.5 C4I Directorate

17.8.1.6 Cyber Defense Directorate

17.8.2 HOMELAND SECURITY

17.8.2.1 Israel Security Agency (Shin Bet)

17.8.2.2 Israel National Police

17.8.2.3 Border Police

17.8.2.4 Home Front Command

17.8.2.5 Fire and Rescue Services

17.8.2.6 Ministry of Public Security

17.9 DEFENSE BUDGET ANALYSIS, BY PLATFORM ALLOCATION

17.9.1 LAND

FIGURE 133 ISRAEL: LAND FLEET (2018–2021)

17.9.2 AIRBORNE

FIGURE 134 ISRAEL: AIR FLEET (2018–2021)

17.9.3 NAVAL

FIGURE 135 ISRAEL: NAVAL FLEET (2019–2022)

17.9.4 SPACE

FIGURE 136 ISRAEL: SATELLITES (2018–2021)**17.9.5 CYBER****17.10 DEFENSE BUDGET ANALYSIS, BY SYSTEM ALLOCATION****17.10.1 ELECTRONICS**

17.10.1.1 Intelligence, surveillance, and reconnaissance

17.10.1.2 Communication, navigation, and surveillance

17.10.1.3 Global navigation satellite system

17.10.1.4 Electronic warfare

17.10.1.5 Digital battlefield

17.10.2 ARMAMENTS

17.10.2.1 Weapons and munitions

17.10.2.2 Firearms and ammunition

TABLE 274 KEY FIREARMS USED BY ISRAELI ARMED FORCES**TABLE 275 KEY CALIBERS USED BY ISRAELI ARMED FORCES****17.11 DEFENSE BUDGET ANALYSIS, BY TECHNOLOGY ALLOCATION****17.11.1 ADVANCED**

17.11.1.1 Use cases

17.11.2 CONVENTIONAL

17.11.2.1 Use cases

17.12 DEFENSE BUDGET ANALYSIS, BY DOMAIN ALLOCATION**17.12.1 MILITARY FORCES****17.12.2 SPECIAL FORCES****17.13 DEFENSE BUDGET ANALYSIS, BY ALLOCATION TYPE****17.13.1 MILITARY EXPENSE****17.13.2 ADMIN EXPENSE****17.14 DEFENSE BUDGET ANALYSIS, BY SALES OVERHEAD****17.14.1 FOREIGN MILITARY SALES****17.14.2 INDIGENOUS SALES****17.15 DEFENSE BUDGET ANALYSIS, COMPETITIVE SCENARIOS****17.15.1 COMPETITIVE LANDSCAPE**

17.15.1.1 Company ranking analysis

FIGURE 137 RANKING ANALYSIS OF TOP 3 PLAYERS IN ISRAEL DEFENSE**BUDGET ANALYSIS, 2022**

17.15.1.2 Competitive benchmarking

TABLE 276 ISRAEL DEFENSE BUDGET ANALYSIS: COMPETITIVE BENCHMARKING**17.15.2 PRIME CONTRACTORS**

17.15.2.1 Israel Aerospace Industries

17.15.2.1.1 Business overview

TABLE 277 ISRAEL AEROSPACE INDUSTRIES: COMPANY OVERVIEW

- 17.15.2.1.2 SWOT analysis
- 17.15.2.1.3 Recent developments
- 17.15.2.1.4 MnM view

17.15.2.2 Rafael Advanced Defense Systems Ltd.

- 17.15.2.2.1 Business overview

TABLE 278 RAFAEL ADVANCED DEFENSE SYSTEMS LTD.: COMPANY OVERVIEW

- 17.15.2.2.2 SWOT analysis
- 17.15.2.2.3 Recent developments
- 17.15.2.2.4 MnM view

17.15.2.3 Elbit Systems

- 17.15.2.3.1 Business overview

TABLE 279 ELBIT SYSTEMS: COMPANY OVERVIEW**FIGURE 138 ELBIT SYSTEMS: COMPANY SNAPSHOT**

- 17.15.2.3.2 SWOT analysis
- 17.15.2.3.3 Recent developments
- 17.15.2.3.4 MnM view

18 OTHER COUNTRIES**18.1 INTRODUCTION****TABLE 280 OTHER COUNTRIES: DEFENSE BUDGET ANALYSIS, 2019–2022 (USD BILLION)****TABLE 281 OTHER COUNTRIES: DEFENSE BUDGET ANALYSIS, 2023–2028 (USD BILLION)****18.2 TRENDS/DISRUPTIONS IMPACTING CONTRACTOR BUSINESS****18.3 REGULATORY AND POLICY LANDSCAPE****18.4 IMPACT OF MEGATRENDS****18.5 TECHNOLOGY TRENDS****18.6 TREND INDICATORS****18.6.1 MACRO**

- 18.6.1.1 GDP and defense budget share (%) of GDP

TABLE 282 GDP AND DEFENSE BUDGET SHARE (%) OF GDP

- 18.6.1.2 Geopolitical intensity/external disputes
- 18.6.1.3 Development index

TABLE 283 HUMAN DEVELOPMENT INDEX

- 18.6.1.4 Terrorism index

TABLE 284 GLOBAL TERRORISM INDEX

- 18.6.1.5 Recession impact analysis

- 18.6.2 MICRO
 - 18.6.2.1 Military strength/recruitment
 - 18.6.2.2 Military modernization
 - 18.6.2.3 Soldier welfare
- 18.7 EXPORT AND IMPORT/TRADE ANALYSIS
- 18.8 DEFENSE BUDGET ANALYSIS, BY DEPARTMENTAL ALLOCATION
 - 18.8.1 MILITARY
 - 18.8.2 HOMELAND SECURITY
- 18.9 DEFENSE BUDGET ANALYSIS, BY PLATFORM ALLOCATION
 - 18.9.1 LAND
 - 18.9.2 AIRBORNE
 - 18.9.3 NAVAL
 - 18.9.4 SPACE
 - 18.9.5 CYBER
- 18.10 DEFENSE BUDGET ANALYSIS, BY SYSTEM ALLOCATION
 - 18.10.1 ELECTRONICS
 - 18.10.1.1 Intelligence, surveillance, and reconnaissance
 - 18.10.1.2 Communication, navigation, and surveillance
 - 18.10.1.3 Global navigation satellite system
 - 18.10.1.4 Electronic warfare
 - 18.10.1.5 Digital battlefield
 - 18.10.2 ARMAMENTS
 - 18.10.2.1 Weapons and munitions
 - 18.10.2.2 Firearms and ammunition
- 18.11 DEFENSE BUDGET ANALYSIS, BY TECHNOLOGY ALLOCATION
 - 18.11.1 ADVANCED
 - 18.11.1.1 Use cases
 - 18.11.2 CONVENTIONAL
 - 18.11.2.1 Use cases
- 18.12 DEFENSE BUDGET ANALYSIS, BY DOMAIN ALLOCATION
 - 18.12.1 MILITARY FORCES
 - 18.12.2 SPECIAL FORCES
- 18.13 DEFENSE BUDGET ANALYSIS, BY ALLOCATION TYPE
 - 18.13.1 MILITARY EXPENSE
 - 18.13.2 ADMIN EXPENSE
- 18.14 DEFENSE BUDGET ANALYSIS, BY SALES OVERHEAD
 - 18.14.1 FOREIGN MILITARY SALES
 - 18.14.2 INDIGENOUS SALES
- 18.15 DEFENSE BUDGET ANALYSIS, COMPETITIVE SCENARIOS

18.15.1 COMPETITIVE LANDSCAPE

18.15.1.1 Company ranking analysis

FIGURE 139 RANKING ANALYSIS OF TOP 3 PLAYERS IN OTHER COUNTRIES' DEFENSE BUDGET ANALYSIS, 2022

18.15.1.2 Competitive benchmarking

TABLE 285 OTHER COUNTRIES' DEFENSE BUDGET ANALYSIS: COMPETITIVE BENCHMARKING

18.15.2 PRIME CONTRACTORS

18.15.2.1 Thales SA

TABLE 286 THALES SA: COMPANY OVERVIEW

18.15.2.2 Airbus SE

TABLE 287 AIRBUS SE: COMPANY OVERVIEW

18.15.2.3 The Boeing Company

TABLE 288 THE BOEING COMPANY: COMPANY OVERVIEW

19 APPENDIX

19.1 KNOWLEDGESTORE: MARKETSandMARKETS' SUBSCRIPTION PORTAL

19.2 AUTHOR DETAILS

I would like to order

Product name: World Defense Budget Analysis by Allocation Type (Military Expense and Admin Expense), Departmental Allocation, Platform Allocation, System Allocation, Domain Allocation, Technology Allocation and Sales Allocation and Region - Global Forecast to 2028

Product link: <https://marketpublishers.com/r/WDC52F7F8C5AEN.html>

Price: US\$ 4,950.00 (Single User License / Electronic Delivery)

If you want to order Corporate License or Hard Copy, please, contact our Customer Service:

info@marketpublishers.com

Payment

To pay by Credit Card (Visa, MasterCard, American Express, PayPal), please, click button on product page <https://marketpublishers.com/r/WDC52F7F8C5AEN.html>

To pay by Wire Transfer, please, fill in your contact details in the form below:

First name:
Last name:
Email:
Company:
Address:
City:
Zip code:
Country:
Tel:
Fax:
Your message:

****All fields are required**

Customer signature _____

Please, note that by ordering from marketpublishers.com you are agreeing to our Terms & Conditions at <https://marketpublishers.com/docs/terms.html>

To place an order via fax simply print this form, fill in the information below
and fax the completed form to +44 20 7900 3970