

The Indian Defence Market 2012-2022

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Abstracts

Report Details

Enabled by substantial economic growth and driven forward by a national policy of military renewal and development, the Indian defence market has been propelled to the forefront of the world stage in relation to global military markets. The rapid rise of Indian defence spending and capabilities reflects India's position not only within the confines of Asia, but throughout the entire world, as the shifting dynamics of geopolitical power tilt its way. Visiongain has determined that the value of the Indian defence market in 2012 amounted to \$38.51bn.

The forecasts and analysis are underpinned by extensive expert consultation and include interviews with Ashok Leyland, Samtel Thales Avionics and the head of the defence technical assessment and advisory service of the CII (Confederation of Indian Industry).

Stemming from the lessons learnt through the experiences of the Kargil conflict and the Mumbai attacks, coupled with more traditional border and geopolitical regional threats emanating from both Pakistan and, increasingly, from China, have led India to establish a firm policy of military procurement which looks set to continue beyond the next decade.

India's strategy to improve its defensive capabilities is to strike a balance between twin commitments to both encourage indigenous development and attract the most advanced foreign made defence systems in the world to Indian soil. This strategy, along with India's progression towards a more privately influenced defence market means that from aircraft and submarines, to communications and unmanned vehicles, the Indian defence market offers significant opportunities for future business.

India's quest to modernise and advance its military touches all divisions and areas of Indian defence, including the Army, Navy and Air Force, as well as areas such as research and development, training, and construction. As a consequence, the market remains active for companies with concentrations across all sectors of Indian defence.

This report contains 89 tables, charts and graphs that add quantitative analysis to explain developing trends within the Indian defence market, as well as individual submarkets that constitute the overall market.

Visiongain provides forecasts for the period 2012-2022 in terms of value (in US\$) for the Indian defence market, as well as for the Indian defence revenue and capital expenditure markets. In addition, eight Indian defence capital expenditure submarkets are analysed.

Unique Selling Points

Comprehensive analysis of the prospects for the Indian defence market from 2012-2022.

Analysis and forecasting informed by extensive expert consultation with industry leaders. You will be able to read full transcripts of interviews from 3 leading experts involved with the Indian defence market.

89 tables, charts and graphs that quantify, analyse and forecast the changing dynamics of the Indian defence market between 2012-2022.

Forecasts and analysis for the overall Indian defence market over 2012-2022

Forecasts and analysis for the capital and revenue expenditure sectors of the Indian defence market from 2012-2022.

Forecasts and analysis for 8 capital expenditure submarkets from 2012-2022.

Analysis of the underlying issues, strategies and policies that influence and characterise the Indian defence market

Profiles of the leading companies operating within the Indian defence market, including all 8 defence public sector undertakings (DPSU), 18 Indian private sector companies and 24 international companies alongside profiles of 37

further Indian companies and over 50 joint ventures/partnership agreements.

Methodology

This report has been compiled by combining information obtained from a very wide and rich mixture of primary and secondary research sources, producing a broad industry overview. Visiongain sought opinions from leading figures in Indian defence to underpin the analysis of market drivers and restraints. The study draws on a diverse range of official corporate and governmental announcements, media reports, policy documents, industry statements and expert opinion as a basis for discussing and predicting developments in the Indian defence market between 2012 and 2022.

Visiongain considers that this methodology results in an accurate, objective mixture of analyses and forecasts.

Why you should buy The Indian Defence Market 2012-2022

You will receive a comprehensive analysis of the Indian defence market from 2012-2022

The analysis and forecasting has been informed by extensive expert consultation with leading figures in the Indian military and industry. Within the report, you will be able to read full transcripts of interviews from 3 experts involved with the Indian defence market:

Samtel Thales Avionics Ltd; a new joint venture in the field of avionics,

Ashok Leyland Defence Systems; a major domestic producer of Indian armoured vehicles,

The foremost expert on India's defence procurement processes; Major General (ret.) Mrinal Suman

You will find 89 tables, charts, and graphs that quantify, analyse and forecast the Indian defence market from 2012-2022

You will receive forecasts and analysis of the overall Indian defence market between 2012-2022

You will discover forecasts and analysis for the revenue expenditure and capital expenditure sectors of the Indian defence market between 2012-2022

You will find forecasts and analysis of 8 Indian defence capital expenditure submarkets over the period 2012-2022:

Construction

Aircraft & Aero Engine

Vehicles

Naval

R&D

Artillery & Missiles

Electronics

Remaining Equipment & Other

You be presented with a SWOT analysis that examines the Indian defence market from 2012-2022

You will gain profiles of leading operators within the Indian defence market:

8 Indian defence public sector undertakings (DPSU)

18 Indian private sector companies

24 International firms

37 further Indian companies profiled

All major joint ventures and partnerships detailed

You will be able to read analysis of 7 major nations seeking to increase defence

exports to India

You will gain knowledge of major contracts, milestone events and procurement programmes within Indian defence

What is the structure of the report?

Chapter 1 is the executive summary.

Chapter 2 of this report provides an introduction to the Indian defence market.

Chapter 3 offers an overview of the Indian defence market. The chapter provides spending forecasts and analysis of growth over the period 2012 to 2022 for the total Indian defence market, as well as the revenue expenditure and capital expenditure markets that make up the Indian defence market.

Chapter 4 focuses on eight submarkets that constitute the Indian capital expenditure market, with details of significant developments, such as contract awards, and accompanying spending forecasts for the period 2012 to 2022.

The submarkets include:

Construction (including buildings, infrastructure and bases)

Aircraft & aero engine

Vehicles

Naval

Research & development

Artillery & missiles

Electronics

Remaining equipment & other

Chapter 5 provides a SWOT analysis, discussing the main strengths, weaknesses, opportunities and threats to the Indian defence market.

Chapter 6 features interviews with three experts with experience of working in the Indian defence market:

Major General Mrinal Suman - head of the defence technical assessment and advisory service of the CII (Confederation of Indian Industry)

Mr Puneet Kaura - a board member of Samtel Group and a director of Samtel Thales Avionics Ltd, a joint venture between Samtel and Thales Group of France

Mr Sundaram Parthasarathi - special director of business planning, Ashok Leyland Defence Systems Ltd

Chapter 7 examines the leading companies operating within the Indian defence market. The chapter includes:

Outline of all 8 Indian Defence Public Sector Undertakings (DPSU)

Overview of 18 leading private Indian defence companies

Profile of additional 37 private Indian defence companies

Outline of 24 leading international defence companies operating within the Indian defence market

Profile of 54 joint ventures or partnerships that exist within the Indian defence market

Chapter 8 analyses seven key nations who export to the Indian defence market

Chapter 9 is a summary of the report, outlining the main conclusions of the analyses.

Chapter 10 is a glossary of acronyms used in the report.

You can order this report today

Anybody with an interest in the Indian defence market should gain valuable information and insight from this new study by visiongain, which analyses one of the most exciting markets in the defence industry. The Indian defence market offers substantial business and investment opportunities and is becoming an increasingly important component of the defence sector globally.

This visiongain defence report will be valuable both to those already involved in the Indian defence market and those wishing to enter the market in the future. Gain an understanding of how to tap into the potential of this market by ordering *The Indian Defence Market 2012-2022*.

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COMPANIES LISTED

ABG Shipyard Limited (ABG)
Adcom Military Industries
Advance Tech Control Pvt Ltd
AgustaWestland
Airbus, Airspace Infrastructure Private Ltd
Alenia Aermacchi
Alenia Aeronautica
Allen Reinforced Plastics Pvt Ltd
Alpha Design Technologies Pvt Ltd
Alpha Phazotron Radar Equipment Systems
Anjani Technoplast
Antonov
Armaris
Ashok Lelyand Defence Systems Ltd (ALDS)
Ashok Leyland
Asta Microwave Products Limited
Aubert Duval
Automotive Coaches and Components Ltd
Avadi Heavy Vehicle Factory
Aviazapchast Plc
Aviotech Ltd
Axis Aerospace and Technologies (AAT)
Babcock Group
BAE Systems
BAE Systems BAEHAL Software Ltd
BAE Systems Bofors AB
BAE Systems India Pvt Ltd
BAE Systems Land and Armaments Group

BAEHAL Software Ltd
Barco NV
Barracuda Camouflaging Ltd
Berretta
Bharat Dynamics Limited
Bharat Earth Movers Limited (BEML)
Bharat Electronics Limited (BEL)
Bharat Electronics Limited OP Financials
Bharat Electronics Limited Optronic Devices Ltd
Bharat Forge
Bharat Shipyard
Boeing Company
Boeing Defence Space and Security (BDS)
BP Solar
BrahMos Aerospace
Bumar Group
Bumar Ltd
Bushmaster Firearms International Llc
CADES Digitech Pvt Ltd
CAE Inc
CAE India Pvt Ltd
Chemring Group
CMC Ltd
Compania Espanola de Sistemas Aeronauticos (CEPA)
Corporation Zashchita
Coyard
Dassault Aviation
Dassault Group
Dassault Systemes
Data Patterns India Pvt Ltd
DCNS India
Defence Land Systems
Defence Land Systems India
Denel Pty
Diehl Defence
Direction des Constructions Navales Services (DCNS)
DMD Group
DRS Technologies
Dynamatic Technologies Ltd

EADS Airbus
EADS Cassidian
EADS Eurocopter
EADS P2I 'Warszawa-Okecie' SA
Edgewood India
Edgewood Technologies Pvt Ltd
Edgewood Ventures Llc
Elbit Systems Electro Optics
Elbit Systems Ltd
ELTA Systems Ltd
Embraer
EON Infotech
European Aeronautic, Defence and Space Company (EADS)
Fincanteri SpA
Finmeccanica SpA
Flash Forge India Pvt Ltd
FN Herstal
Garden Reach Shipbuilders and Engineers Limited (GRSE)
General Dynamics C4 Systems (GDC4S)
General Dynamics Corporation
General Dynamics Land Systems (GDLS)
General Dynamics UK (GDUK)
General Electric
General Electric Medical Systems
Goa Shipyard Ltd
Godrej & Boyce Manufacturing Company Ltd
Godrej Group
Grob Aircraft
HAL Edgewood Technologies Pvt Ltd
HALBIT Avionics Pvt Ltd
Hartzell Propellers
HATSOFF Helicopter Training Pvt Ltd
Hawker Beechcraft Corporation
HBL Nife Power Systems
HCL Aerospace & Defence
HCL Technologies
Heavy Engineering Corporation
Heckler & Koch
Hinduja Automotive

Hinduja Group
Hindustan Aeronautics Limited (HAL)
Hindustan Opticals
Hindustan Shipyard
Honeywell Automation India Ltd (HAIL)
Honeywell Avionics
Honeywell International Inc.
Honeywell Technology Solutions (HTSL)
Honeywell Turbo Technologies (HTT)
Howaldswerke Deutsche Werft (HDW)
ICICI Bank
Ilyushin Jsc
INCAT
Indo-Russian Aviation Ltd
Infotech Enterprises Ltd
Infotech HAL Ltd
Intermarine
International Aero Manufacturing Pvt Ltd
Israel Aerospace Industries Ltd (IAI)
Israel Weapons Ltd
Jupiter Aviation Logistics (JAL)
Jupiter Strategic Technologies Pvt (JST) Ltd
Kalyani Group
Kamov Jsc
Kangnam
Kawasaki
KEW Industries Ltd
Kirloskar Brothers Ltd
Korean Aerospace Industries (KAI)
KPB Tula
Krauss-Maffei Wegmann GmbH & Co. (KMW)
Larsen & Toubro Ltd (L&T)
LIG NEX1
Lockheed Martin Corporation
Lockheed Martin India Private Ltd
Magellan Aerospace Corporation
Magnum Aviation
Mahindra & Mahindra (M&M)
Mahindra Satyam

Max Aerospace and Aviation Limited
Mazagon Dock Limited (MDL)
Mazagon-Pipavav Ltd
MBDA Systems
Memory Electronics Pvt Ltd
Merlin Hawk Associates
Michelin
Microcon
Mikoyan
Mishra Dhatu Nigam Limited (MIDHANI)
MKU
Multirole Transport Aircraft Ltd
Multitone Mobile Communications Company
Navatina
Nelco
Northrop Grumman Corporation
Nova Integrated Systems Ltd
NPO Mashinostroyeniya Jsc
Panhard General Defence
Paramount Group
Pawan Hans
Pearson Engineering
Phazotron Corporation
Pilatus Aircraft
Pipavav Defence & Offshore Engineering Company Ltd
Pipavav Shipyard Limited (PSL)
Pratt & Whitney (P&W)
Premium AEROTECH GmbH (PAG)
Punj Lloyd Ltd
QuEST Global Engineering
Rafael Advanced Defence Systems Limited
Ramoss India Ltd
Rayazan SIP
Raytheon Company
Raytheon India
Raytheon Integrated Defense Systems
Reliance Group
Reliance Industries Ltd
Rheinmetall Air Defence

RK Machine Tools
RMX Bridport Defence Systems Pvt
Rolls Royce Defence & Aerospace
Rolls Royce Group Plc.
Rolls Royce Overseas Holdings Ltd
Rolta India Limited
Rolta Thales
Rosoboronexport
Rostvertol
Russian Aircraft Corporation (RAC/MiG)
Saab AB
Saab Dynamics
Safran Group
Samtel Display Systems Ltd (SDS)
Samtel Group
Samtel Group India
Samtel HAL Display Systems Ltd (SHDS)
Samtel Thales Avionics Ltd
SangYong Motor Company
Seamless Group
SEC Industries Pvt Ltd
Selex Communications
Selex Galileo
Serial Innovations
Setforge
Shrilakshmi Cotsyn Corporation
Shrilakshmi Defence Solutions Ltd (SLDS)
SIGMA Microsystems
SIGT Pvt Ltd
Sikorsky Aircraft Corporation
Singapore Technologies Kinetics
Skanda Aerospace
Snecma (Soci?t? Nationale d'?tude et de Construction de Moteurs d'Aviation)
Snecma HAL Aerospace Pvt Ltd
Soltam Systems
Southern Group Industries
Speck Systems
SQuAD
Steel Authority of India Ltd

Sukhoi Jsc
Sunlight Systems
Svipja Technologies
Tamil Nadu Industrial Development Corporation Ltd (TIDCO)
Tandon Group
Taneja Aerospace & Aviation Ltd
Tata Advanced Materials (TAM)
Tata Advanced Systems (TAS)
Tata BP Solar
Tata Communications
Tata Consultancy Services (TCS)
Tata Elxi Ltd
Tata Group
Tata HAL Technologies Ltd
Tata Industries Ltd
Tata Motors
Tata Power Company
Tata Power Strategic Electronics Division (SED)
Tata Technologies
Tata Teleservices
Tatra
Tatra Sipox
TDA Armaments
Telcom
Textron Systems Corporation
Thales Group
Thales International India Pvt Ltd
Thales Software India Pvt
TIL Tractors India Ltd
TS Kisan & Co. Pvt Ltd
TSL Defence Technologies Pvt
Turbomeca
Turbomeca India Engines Pvt Ltd
UAC Transport Aircraft
Ukrinmash
United Aircraft Corporation (UAC)
United Aircraft Corporation Transport Aircraft (UAC-TA)
United Technologies Corporation (UTC)
Ukraineexport

Uralvagonzavod Scientific Industrial Corporation Plc
Vecima
VEM Technologies
VXL Technologies
Walchandnagar Industries Ltd
Wartsila India
WFEL
Wipro Technologies
Zen Technologies

GOVERNMENT AGENCIES AND OTHER ORGANISATIONS MENTIONED IN THIS REPORT

ADA: Aeronautical Development Agency
ADE: Aeronautical Development Establishment
ADRDE: Aerial Delivery Research and Development Establishment
ANURAG: Advanced Numerical Research and Analysis Group
ARC: Aviation Research Centre
CABS: Centre for Airborne Systems
Car Nicobar Air Force Base
Centre of Excellence for Net-Centric Warfare
Chinese Navy
Chinese People's Liberation Army (PLA)
CHITRA: Centre for High Performance Computing and Research
CII: Confederation of Indian Industry
Communist Party of India (Maoist)
CSIO: Central Scientific Instruments Organisation
CVRDE: Combat Vehicles Research and Development Establishment
DAC: Defence Advisory Council
DEAL: Defence Electronics Applications Laboratory
DIPP: Department of Industrial Policy & Promotion
DODP: Department of Defence Production
DOFA: Defence Offset Facilitation Agency
DRDO: Defence Research and Development Organisation
FIPB: Foreign Investment Promotion Board
IAF: Indian Air Force
IMF: International Monetary Fund
IN: Indian Navy
Indian Coast Guard

Indian Treasury
INS Arihant
INS Chakra
INS Deepak
INS Jalashwa
INS Kabra
INS Shalki
INS Sharkul
INS Shivalik
INS Vikramaditya
ISAF: International Assistance Force
ISRO: Indian Space Research Organisation
Karwar Naval Base
Kochi Naval Base
MoD: Indian Ministry of Defence
NATO: North Atlantic Treaty Organisation
Parliamentary Standing Committee on Defence
Phalodi Airfield
Port Blair
RDE: Research and Development Establishment
Russian Federal Agency of State Property
SIPRI: Stockholm International Peace Research Institute
Suriname Armed Forces
Teri University
UK Defence Science and Technology Laboratory (DSTL)
UN: United Nations
US Congress
US DoD: United States Department of Defense
US Navy
USDSCA: United States Defense Security Cooperation Agency
Wikileaks

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