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The Soldier Modernisation Market 2012-2022

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Abstracts

The soldier modernisation market has begun to emerge over recent years as various national programmes have developed from their conceptual origins in the 1990s to become reality. Leading military nations have demonstrated a determination to equip large numbers of troops with suites of soldier modernisation equipment, and Visiongain's calculations indicate that the value of the soldier modernisation market will reach $804.2m in 2012.

The global soldier modernisation market is expected to grow significantly over the forecast period as the continual digitisation of the modern battlefield has convinced many nations of the imperative to field infantry capable of utilising tools such as advanced navigation, as well as communication and targeting equipment. These needs are particularly pressing when conducting counterinsurgency (COIN) operations against disparate and unconventional forces with an intimate knowledge of local terrain.

Ongoing technological advances in fields including powered exoskeletons and fuel cells will help to drive the soldier modernisation market over the next decade, while the most immediate restraint on the market will be the effects of the continued global financial crisis, most acutely felt in Europe and North America, which has led to cuts in defence budgets and delay or cancellation characterising some soldier modernisation programmes (SMPs). Overall, a more incremental approach to soldier modernisation procurement has begun to materialise, however this trend is less pronounced in many emerging nations, particularly in the Asia-Pacific region, where military budgets continue to rise and the political will to embark upon SMPs exists. This is most true of the BRIC (Brazil, Russia, India and China) powers.

The report contains 162 tables, charts and graphs that add visual analysis in order to explain developing trends within the soldier modernisation market. Visiongain provides forecasts for the period 2012-2022 in terms of value (US$) for the soldier modernisation

market as well as for 5 submarkets (C4I/C4ISR, lethality, sustainability, survivability and mobility) that together form the overall market figure. These soldier modernisation markets are quantified, analysed and forecast from 2012-2022, alongside 21 leading national soldier modernisation markets and 2 regional markets. The report provides profiles of 21 leading companies operating within the market, and includes 3 interviews with important figures in the field of soldier modernisation, providing expert insight.

Unique Selling Points

A comprehensive analysis of the soldier modernisation market with detailed forecasts provided from 2012-2022.

Analysis and forecasting which has been underpinned by consultation with experts from within the field of soldier modernisation. Within the report are 3 full transcripts from interviews conducted with Thales Norway, ITT Corporation and the War Studies Department of King's College London.

Forecasts for 5 soldier modernisation submarkets from 2012-2022.

Forecasts for the 23 leading soldier modernisation markets, as well as rest of the world summaries and projections for the period 2012-2022.

162 tables, charts, and graphs quantifying and forecasting the soldier modernisation market in detail from 2012-2022.

A SWOT and a PEST analysis that examines the soldier modernisation market.

Profiles of 21 leading companies operating within the soldier modernisation market.

This definitive report should prove invaluable to anyone currently involved in the soldier modernisation market or those who wish to enter this dynamic and fast-growing sector.

This report has been compiled by combining information gleaned from a wide range of primary and secondary research sources, producing a broad industry overview. Visiongain sought opinions from leading figures in the soldier modernisation market 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 soldier modernisation 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 Soldier Modernisation Market 2012-2022

You will receive a comprehensive analysis of the prospects for the global soldier modernisation market with detailed forecasts from 2012-2022

You will be able to study 162 tables, charts and graphs that illustrate the changing dynamics of the soldier modernisation market between 2012-2022

Analysis and forecasting has been underpinned by consultation with experts from within the field of soldier modernisation. Within the report are full transcripts of 3 expert interviews conducted, providing unique insight into the market

Thales Norway AS

ITT Corporation

The Department of War Studies, King's College London

You will receive forecasts for 5 soldier modernisation submarkets from 2012-2022:

C4I/C4ISR

Lethality

Sustainability

Survivability

Mobility

You will receive forecasts for the 23 leading soldier modernisation markets, covering 27 nations over 5 continents, as well as rest of the world figures and

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projections for the period 2012-2022:

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Germany

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Australia

Russia

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Switzerland

Norway

Poland

Japan

South Korea

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Saudi Arabia, UAE, Jordan

Canada

Brazil

South Africa

Rest of the World (RoW)

A SWOT and PEST analysing the forces that influence and characterise the soldier modernisation market

You will find profiles of 21 leading companies operating within the soldier modernisation market

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COMPANIES LISTED

ABSL Power Solutions
Aearo Corporation
Aero Sekur
Alliant Techsystems (ATK)
Amopack
Android
Apple Inc.
BAE Systems C4
BAE Systems Hagglunds
Beretta
Black Diamond Advanced Technology
Blucher Systems

Bumar Group
Boeing Company
Bren-tronics
Camero
Cassidian
China North Industries Corporation (NORINCO)
Computech International
Daewoo
Dell
Denel Land Systems
DRS Tactical Systems
Elbit Systems Ltd.
Elbit Systems Land and C4I - Tadiran
Elint
Elisra
Elno
EnerSys
European Aeronautic Defence and Space (EADS) Group
Fedur
Finmeccanica Group
FN Herstal
Fokker Aerostructures
General Dynamics
General Dynamics C4 Systems
General Dynamics UK
General Electric
Glenair Inc.
Grupo Mecanica de Vuelo
Harris Corporation
Harris RF Communications
Heckler & Koch
Herstal Group
Hitachi
IBM
Indra Sistemas
Insta DefSec
iRobot Corporation
Israel Testing Laboratories (ITL)
Israel Weapon Industries

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Israeli Military Industries (IMI)
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ITT Electronic Systems
ITT Elexis
Iturri
Jordan Electronic Logistics Support
Kitron
Kongsberg
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Kord Tech Pty Ltd.
Kroko
L-3 Brashear
L-3 Communications
L-3 TRL Technology
Larimart
LFR
Lilaas
Lockheed Martin Corporation
Madritsch
Makspol
Marom Dolphin
Meopta
MIL Power Limited
Millog
Modulowy System
Motorola
MOWAG
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Rheinmetall Defence
Rockwell Collins
Safran Group
Saft Batteries
Sagem Defence Securite
Samsung Group
Samsung Thales
Savox Communications
Schuberth
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Selex Elsag
Selex Galileo
Selex Sistemi Integrati
Silynx
Singapore Technology (ST) Electronics
Singapore Technology (ST) Kinetics
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Sistema Composti
Soldier Systems Centre
Sterling
Steyr
Tanagram
Tata Advanced Materials
Tate BP Solar
Tata Communications
Tata Elxsi Ltd.
Tata Group
Tata Indicom
Tata Teleservices

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Texplorer
Thales Angenieux
Thales Australia
Thales Communications
Thales Group
Thales Norway AS
Transform
Trijicon
Ultra-Cell
Ultralife Corporation
Vectronix
VOP-026
VT Miltope
WetPC Pty Ltd
Wilcox Industries

GOVERNMENT AGENCIES AND OTHER ORGANISATIONS MENTIONED IN THIS REPORT

Argentine Rapid Deployment Force
Armasuisse
Armscor
Armed Forces of the Philippines (AFP)
Australian Defence Apparel (ADA)
Australian National University (ANU)
Australian Defence Force (ADF)
Brazilian Army
British Army
British Integrated Soldier System Executive (ISSE)
Co-operation Council for Arab States of the Gulf (GCC)
Chinese People's Liberation Army (PLA)
Danish Army
Danish Fromandskorpset
Danish J?gerkorpset
Department of War Studies, King's College London
Diggerworks Australia
Dutch Army

European Defence Agency (EDA)
Finnish Defence Force (FDF)
French 1st Infantry Regiment
French 13th Mounted Infantry Battalion
French Army
French Delegation Generale pour l'Armement (DGA)
French Ministere de la Defense
German Army (Bundeswehr)
German Federal Office of Defence Technology and Procurement (BWB)
Indian Army
Indian Defence Research and Development Organisation (DRDO)
International Security Assistance Force (ISAF)
Israeli Defence Force (IDF)
Israeli Golani Brigade
Italian Army
Italian Army 'Pinerolo' Brigade
Italian Infantry School
Italian Ministry of Defence
Japanese Defence Ministry
Japanese Self-Defence Forces (JSDF)
Jordanian Royal Special Forces
Liberation Tigers of Tamil Eelam (LTTE)
Moro Islamic Separatist Front (MILF)
NATO Army Armaments Group (AAG)
NATO Land Capability Group 1 (LCG/1) - formerly NATO Topical Group 1 (TG/1)
NATO Research and Technology Organisation (RTO)
Netherlands Organisation for Applied Research (TNO)
North Atlantic Treaty Organisation (NATO)
North Korean People's Army Ground Force
Norwegian Armed Forces (NAF)
Norwegian Forsvarets Forskninginstitutt (FFI) - Defence Research Establishment
Norwegian Ministry of Defence (MoD)
Polish Land Forces
Polish Ministry of Defence
Republic of Korea Army (ROKA)
Romanian Army
Royal College of Defence Studies
Russian Army
Russian Defence Ministry

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South African Department of Defence
South African National Defence Force (SANDF)
South Korean Agency for Defence Development (ADD)
South Korean Ministry of National Defence (MND)
Spanish Army
Spanish Ministry of Defence
Sri Lankan Special Infantry Operations Team (SIOT)
Swedish Army
Swedish National Defence Sollege
Swiss Army
UK Defence Science Advisory Council
UK Integrated Soldier System Executive (ISSE)
UK Joint Services Command and Staff College
UK Ministry of Defence (MoD)
UK Personal Equipment and Common Operational Capability (PECOC) Group
UK Royal Air Force (RAF)
UK Royal Marines
US 4/9th 'Manchu' Stryker Brigade Combat Team
US Army
US Army Special Forces
US Defence Advanced Research Products Agency (DARPA)
US Department of Defense (DoD)
US Marine Corps (USMC)
US Programme Executive Office (PEO)
US Senate Committee under the Budget Control Act
US Special Operations Command (SOCOM)

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