The Polish Defense Sector - Market Opportunities and Entry Strategies, Analyses and Forecasts to 2015

Description: This report offers insights into the market opportunities and entry strategies adopted by foreign OEMs (original equipment manufacturers) to gain a market share in the Polish defense industry. In particular, it offers in-depth analysis of the following:

- Market opportunity and attractiveness: detailed analysis of the current industry size and growth expectations during 2010–2015, including highlights of the key growth stimulators. It also benchmarks the industry against key global markets and provides detailed understanding of emerging opportunities in specific areas.
- Procurement dynamics: trend analysis of imports and exports, together with its implications and impact on the Polish defense industry.
- Industry structure: five forces analysis to identify various power centers in the industry and how these are likely to develop in the future.
- Market entry strategy: analysis of possible ways to enter the market, together with detailed descriptions of how existing players have entered the market, including key contracts, alliances, and strategic initiatives.
- Competitive landscape and strategic insights: analysis of competitive landscape of the defense industry in Poland. It provides an overview of key defense companies (both domestic and foreign), together with insights such as key alliances, strategic initiatives, and a brief financial analysis.
- Business environment and country risk: a range of drivers at country level, assessing business environment and country risk. It covers historical and forecast values for a range of indicators, evaluating business confidence, economic performance, infrastructure quality and availability, labor force, demographics, and political and social risk.

Scope:

- analysis of Defense industry market size from 2004 through 2009 and forecasts till 2015
- analysis of defense budget allocation
- Benchmarking with key global markets
- Market opportunities
- Defense procurement dynamics
- Industry dynamics
- Market entry strategy
- Competitive landscape and strategic insights
- Business environment and country risk

Reasons to buy:

- Gain insight into Polish defense industry with current, historic and forecast market values
- Get insight on market opportunity and attractiveness
- Get insight on industry procurement dynamics
- Gain insight on industry structure
- Gain insight into the regulations governing the Polish defense industry and the potential market entry strategies with an expert analysis of the competitive structure
- Identify top companies of the Polish defense industry along with profiles of all those companies

Key highlights:

Poland's military expenditure is estimated to value US$8.2 billion in 2010, and its defense market is the largest in Central Europe. During the review period, defense expenditure has grown at a CAGR of 11.35%, and during the forecast period is expected to record a CAGR of 8.48%, to reach a value of US$12.4 billion by 2015. Currently, the Polish defense industry is undergoing a defense infrastructure modernization phase, due to which the nation's military expenditure is expected to continue to rise over the forecast period. Furthermore, the combination of a strained relationship with Russia, several Polish peacekeeping missions and strong economic growth forecast, will drive defense expenditure over the forecast period.
Over the review period, the average capital expenditure allocation of the total defense budget was 20% and
revenue expenditure allocation 80%; however the average share of capital expenditure is expected to
increase to approximately 23% during the forecast period. The Polish government's initiatives to replace
obsolete defense equipment and reduce troop size are significant contributing factors to capital expenditure
increase.

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