The Russian 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 Russian 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 Russian 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 Russia. 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 Russian 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 Russian defense industry and the potential market entry strategies with an expert analysis of the competitive structure
- Identify top companies of the Russian defense industry along with profiles of all those companies

Key highlights:

Russia has the longest border in the world, which it shares with 14 other countries. It also has the highest natural gas reserves in the world, and has large deposits of many other minerals. The country has over 1300 domestic defense firms, which cater to the entire needs of the Russian armed forces. In addition, the country is the second largest exporter of arms. During 2010–15, Russia's overall defense expenditure is estimated to grow at a CAGR (compound annual growth rate) of 17.71%, in accordance with the country's commitment to the protection of civilians and critical infrastructure. By 2015, defense expenditure will account for 2.7% of its GDP, with an average per capita defense expenditure of US$464.7 during the forecast period. The country is forecast to spend 53% of its budget for arms procurements on the research of
Attractive opportunities to emerge in the short- to medium-term include ballistic missiles, mistral-class ships, UAVs (unmanned aerial vehicles), T-90 tanks, helicopters and satellites. In 2010, Russia's defense export market is estimated to be worth US$9.5 billion and involves 82 countries. However, as China and India, the biggest consumers of Russia's defense exports, have reduced the amount they procure from Russia, the country is focused on expanding its market to countries in South America and Africa.
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