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

Key highlights:

The South African defense market, though not particularly large, is a moderately growing market with a defense expenditure allocation of US$3.6 billion for 2009. Post-apartheid, the country witnessed a significant decline in its defense budget, both in terms of value and as a percentage of GDP. Furthermore, a peaceful neighboring environment and very low terrorist activity levels contribute to the recent overall reductions in defense spending. Nevertheless, although the threat from external aggression is low, the country has one of the highest crime rates in the world. However, its hosting of the FIFA World Cup 2010 and concerns about the future prospects of the country, should an incident have occurred, has intensified the South African government's focus on tackling crime. Furthermore, as the country is engaged in various peacekeeping
missions under the United Nations, African Union and Southern African Development Community, external funding for these missions additionally increases the defense budget.

By the end of 2015, Progressive Intelligence estimates that South Africa's defense expenditure as a percentage of its gross domestic product (GDP) will rise from its current level of 1.3% to 1.5%. This translates as budget increase from US$3.6 billion in 2009 to US$5.6 billion in 2015, and a compound annual growth rate (CAGR) of 9.06%. Currently, 78% of the defense budget is allocated for revenue expenditure, and the remaining for capital expenditure, a trend that is expected to continue until 2015. As a result of the challenges caused by increased crime levels, it is expected that there will be a greater immediate demand for monitoring and security check equipment, including CCTV. Over the next two to three years, it is also predicted that there will be a rise in demand for UAVs (unmanned aerial vehicles), military transport fleet, maritime surveillance equipments, including patrol aircrafts, landward defense systems, and survey vessels.
5.1 Five Forces Analysis
5.1.1 Bargaining power of supplier: low
5.1.2 Bargaining power of buyer: high
5.1.3 Barrier to entry: medium
5.1.4 Intensity of rivalry: high
5.1.5 Threat of substitution: medium

6 Market Entry Strategy
6.1 Market Regulation
6.1.1 Offset policy ensures support for local companies
6.1.2 Foreign direct investment is channeled to benefit local business

6.2 Market Entry Route
6.2.1 Foreign OEMs find alternative routes into the market
6.2.2 Joint ventures and collaborations provide market entry opportunities

6.3 Key Challenges
6.3.1 Corruption and bribery
6.3.2 Small market size discourages significant investment
6.3.3 Lack of transparency
6.3.4 Lack of relevant defense policy

7 Competitive Landscape and Strategic Insights
7.1 Competitive Landscape Overview
7.2 Key Public Sector Companies
7.2.1 Denel: overview
7.2.2 Denel: products and services
7.2.3 Denel: recent announcements and strategic initiatives
7.2.4 Denel: alliances
7.2.5 Denel: recent contract wins
7.2.6 Denel: financial analysis
7.2.7 Ansys Limited: overview
7.2.8 Ansys Limited: products and services
7.2.9 Ansys Limited: recent announcements and strategic initiatives
7.2.10 Ansys Limited: alliances
7.2.11 Ansys Limited: recent contract wins
7.2.12 Ansys Limited: financial analysis
7.3 Key Private Sector Players
7.3.1 Reutech: overview
7.3.2 Reutech: products and services
7.3.3 Reutech: recent announcements and strategic initiatives
7.3.4 Reutech: alliances
7.3.5 Reutech: recent contract wins
7.3.6 Reutech: financial analysis
7.3.7 Saab Grintek: overview
7.3.8 Saab Grintek: products and services
7.3.9 Saab Grintek: recent announcements and strategic initiatives
7.3.10 Saab Grintek: alliances
7.3.11 Saab Grintek: recent contract wins
7.3.12 Saab Grintek: financial analysis
7.3.13 Land Systems South Africa: overview
7.3.14 Land Systems South Africa: products and services
7.3.15 Land Systems South Africa: recent announcements and strategic initiatives
7.3.16 Land Systems South Africa: alliances
7.3.17 Land Systems South Africa: recent contract wins
7.3.18 Land systems South Africa: financial analysis
7.3.19 IVEMA: overview
7.3.20 IVEMA: products and services
7.3.21 IVEMA: recent announcements and strategic initiatives
7.3.22 IVEMA: alliances
7.3.23 IVEMA: recent contract wins
7.3.24 IVEMA: financial analysis
7.3.25 Aerosud: overview
7.3.26 Aerosud: products and services
7.3.27 Aerosud: recent announcements and strategic initiatives
7.3.28 Aerosud: alliances
7.3.29 Aerosud: recent contract wins
7.3.30 Aerosud: financial analysis
7.3.31 Turbomeca Africa: overview
7.3.32 Turbomeca Africa: products and services
7.3.33 Turbomeca Africa: recent announcements and strategic initiatives
7.3.34 Turbomeca Africa: alliances
7.3.35 Turbomeca Africa: recent contract wins
7.3.36 Turbomeca Africa: financial analysis
7.3.37 Global Armour: overview
7.3.38 Global Armour: products and services
7.3.39 Global Armour: recent announcements and strategic initiatives
7.3.40 Global Armour: alliances
7.3.41 Global Armour: recent contract wins
7.3.42 Global Armour: financial analysis
7.3.43 Milkor (Pty) Ltd: overview
7.3.44 Milkor (Pty) Ltd: products and services
7.3.45 Milkor (Pty) Ltd: recent announcements and strategic initiatives
7.3.46 Milkor (Pty) Ltd: alliances
7.3.47 Milkor (Pty) Ltd: recent contract wins
7.3.48 Milkor (Pty) Ltd: financial analysis
7.3.49 Advanced Technologies and Engineering: overview
7.3.50 Advanced Technologies and Engineering: products and services
7.3.51 Advanced Technologies and Engineering: recent announcements and strategic initiatives
7.3.52 Advanced Technologies and Engineering: alliances
7.3.53 Advanced Technologies and Engineering: recent contract wins
7.3.54 Advanced Technologies and Engineering: financial analysis
7.3.55 Tellumat Defense: overview
7.3.56 Tellumat Defense: products and services
7.3.57 Tellumat Defense: recent announcements and strategic initiatives
7.3.58 Tellumat Defense: alliances
7.3.59 Tellumat Defense: recent contract wins
7.3.60 Tellumat Defense: financial analysis
8 Business Environment and Country Risk
8.1 Business Confidence
8.1.1 Business confidence index
8.1.2 Market capitalization trend – Johannesburg Stock Exchange, South Africa
8.1.3 FDI inflows by sector
8.1.4 Deployment of credit by sector
8.2 Economic Performance
8.2.1 GDP at constant prices
8.2.2 GDP per capita at constant prices
8.2.3 GDP at current prices
8.2.4 GDP per capita at current prices
8.2.5 GDP split by key segments
8.2.6 Agriculture – agricultural output value at current prices (Local Currency)
8.2.7 Agriculture – agricultural output value at current prices (US Dollar)
8.2.8 Agriculture – agricultural output at current prices as percentage of GDP
8.2.9 Manufacturing – manufacturing output at current prices (local currency)
8.2.10 Manufacturing – manufacturing output at current prices (US Dollar)
8.2.11 Manufacturing – manufacturing output at current prices as percentage of GDP
8.2.12 Manufacturing – mining, manufacturing and utilities output at current prices (local currency)
8.2.13 Manufacturing – mining, manufacturing and utilities output at current prices (US Dollar)
8.2.14 Manufacturing – mining, manufacturing and utilities output at current prices as percentage of GDP
8.2.15 Construction – construction output at current prices (local currency)
8.2.16 Construction – construction output at current prices (US Dollar)
8.2.17 Construction – construction output at current prices as a percentage of GDP
8.2.18 Industry - crude steel production
8.2.19 Industry - crude oil consumption
8.2.20 Inflation rate
8.2.21 Fiscal deficit as a percentage of GDP
8.2.22 Trade balance as a percentage of GDP
8.2.23 Exports as a percentage of GDP
8.2.24 Imports as a percentage of GDP
8.2.25 Exports growth
8.2.26 Imports growth
8.2.27 External debt as percentage of GDP
8.2.28 Exchange rate US$-ZAR (annual average)
8.2.29 Exchange rate US$-ZAR (end of fiscal)
8.2.30 Debt service ratio
8.3 Infrastructure Quality and Availability
8.3.1 Transport - highways and railways
8.3.2 Transport - passenger vehicle production volume
8.3.3 Transport - commercial vehicle production volume
8.3.4 Transport - automotive component exports trend
8.3.5 Transport - automotive product imports trend
8.3.6 Transport - passenger car penetration
8.3.7 Utilities - total installed capacity for electricity generation
8.3.8 Utilities - installed capacity for conventional thermal electricity generation
8.3.9 Utilities - electricity production
8.3.10 Utilities - installed capacity for hydroelectricity generation
8.3.11 Utilities - installed capacity for renewable electricity generation
8.3.12 Utilities - electricity power consumption
8.3.13 Utilities - electricity exports
8.3.14 Utilities - electricity imports
8.3.15 Healthcare - healthcare expenditure
8.3.16 Healthcare - healthcare expenditure as a percentage of GDP
8.3.17 Healthcare - healthcare expenditure per capita
8.3.18 Communication - total internet subscribers
8.3.19 Communication - broadband internet subscribers
8.3.20 Communication - personal computer penetration
8.3.21 Communication – mobile phone penetration rate
8.3.22 Technology - research and development expenditure as a percentage of GDP
8.4 Labor Force
8.4.1 Labor force
8.4.2 Unemployment rate
8.5 Demographics
8.5.1 Annual disposable income
8.5.2 Annual per capita disposable income
8.5.3 Annual consumer expenditure on food
8.5.4 Urban and rural population
8.5.5 Females as percentage of population
8.5.6 Males as percentage of population
8.5.7 Mean age of population
8.5.8 Median age of population
8.5.9 Population density
8.5.10 Age distribution – total population
8.5.11 Age distribution – male population
8.5.12 Age distribution – female population
8.5.13 Number of households
8.6 Political and Social Risk
8.6.1 Political stability
8.6.2 Terrorism index
8.6.3 Transparency index

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