The Malaysian 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 Malaysia 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 Malaysia 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 Malaysia. 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.

Synopsis:

- Top level overview of the Malaysia defense industry
- A breakdown of the Malaysia defense industry by spend pattern valued from 2004 through 2009 and forecasted from 2010 through 2015
- A breakdown of the markets by segment valued from 2004 through 2009 and forecasted from 2010 through 2015
- Details of top companies active across the Malaysia defense industry
- Emerging trends and opportunities in the Malaysia defense industry in the last 12 months

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 Malaysia defense industry with current, historic and forecast market values
- Get insight on market opportunity and attractiveness
Malaysian military expenditure recorded a CAGR of 6.62% during the review period, and is expected to grow at a CAGR of 8.65% during the forecast period, to reach US$5.4 billion by 2015. The country's defense expenditure is anticipated to continue to increase, due its geographical location in an unstable region, its involvement with Singapore in competitive arms procurement, a strained relationship with Indonesia and its involvement in peacekeeping missions. Furthermore, in order to compensate for historically low levels of defense expenditure, the country is expected to allocate increased levels of investment to the defense sector in order to modernize its armed forces.

In 2009, capital expenditure accounted for 22% of the total defense budget, while revenue expenditure accounted for 78%. However, during 2012–15, the capital expenditure share of the total defense budget is expected to increase to an average of 24%, due to anticipated improvements in the Malaysian economy, which will in turn enable the government to undertake acquisitions of modern defense equipment during the same period.

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