The Italy 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 Italian 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 Italian 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 Italy. 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 of the report:

- Analysis of the 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 the Italian 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 Italian defense industry and the potential market entry strategies with an expert analysis of the competitive structure
- Identify top companies of the Italian defense industry along with profiles of all those companies

Synopsis:

- Top level overview of the Italian defense industry
- A breakdown of the Italian 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 Italian defense industry
- Emerging trends and opportunities in the Italian defense industry in the last 12 months
Key Highlights:

The annual defense budget of Italy in 2009 stood at US$28.3 billion, which is inclusive of homeland security, defense function and other non-essential expenditures of the military. The defense function budget of Italy's armed forces stood at US$20 billion in 2009, recording a CAGR of 2.59% during the review period. However, this is expected to decline at a CARC of -0.64% during the forecast period, to reach US$18.2 billion by 2015. The total defense budget of Italy is also expected to decline at a CARC of -0.84%, to reach US$25.7 billion by 2015. This decline is due to the austerity measures adopted by all ministries in order to reduce the fiscal debt of the country.

Furthermore, total defense expenditure as a percentage of GDP is expected to decrease from an average of 1.3% during the review period to 1.1% by 2015 due to cuts to the budget. The defense function budget is also expected to decline from 0.9% of GDP in 2009 to 0.8% by 2015. Despite this, Italian defense expenditure will continue to be driven by the modernization program of the armed forces and the country's participation in NATO and UN peacekeeping missions.

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