The Romanian Defense Industry - Market Opportunities and Entry Strategies
Analyses and Forecasts to 2015

Description:
Synopsis
- Top level overview of the Romanian defense industry
- A breakdown of the Romanian defense industry by spend pattern valued from 2006 through 2010 and forecasted from 2011 through 2015
- A breakdown of the markets by segment valued from 2006 through 2010 and forecasted from 2011 through 2015
- Details of top companies active across the Romanian defense industry
- Emerging trends and opportunities in the Romanian defense industry in the last 12 months

Summary
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 Romanian 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 2011–2015, 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 Romanian 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 Romania. 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 2006 through 2010 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 Romanian 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 Romanian defense industry and the potential market entry strategies with an expert analysis of the competitive structure
- Identify top companies of the Romanian defense industry along with profiles of all those companies

Key Highlights:
The Romanian defense expenditure registered a CARC of -1.53% during the review period and is estimated to be worth US$1.5 billion in 2011. Active participation in North Atlantic Treaty Organization (NATO) and United Nations (UN) peacekeeping missions, joint operations and border control measures drove expenditure during the review period. These factors are expected to continue to drive defense expenditure throughout the forecast period, with spending anticipated to increase at a CAGR of 2.83% to reach US$1.7 billion by 2015. As a percentage of the gross domestic product (GDP), the country's defense budget stood at 0.9% in 2011 and is expected to decline to 0.6% of GDP by 2015, mainly because the country's GDP is increasing at a faster rate than its military expenditure.

The capital expenditure allocation of the defense budget, which stood at an average of 12.9% during the review period, is estimated to increase to an average of 14.5% during the forecast period as a result of an increase in equipment purchases. Consequently, revenue expenditure is likely to decrease from an average of 87.1% during the review period to an average of 85.5% during the forecast period.

Key opportunities for equipment suppliers are expected in areas such as military transport aircraft, wheeled armored personnel carriers and F-16 fighter aircraft.

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