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

Description:

Synopsis
- Top level overview of the Sri Lankan defense industry
- A breakdown of the Sri Lankan 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 Sri Lankan defense industry
- Emerging trends and opportunities in the Sri Lankan defense industry in the last 12 months

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

Key Highlights

Sri Lankan defense expenditure, estimated at US$1.5 billion during 2011, grew at a CAGR of 17.37% during
During the forecast period, it is expected to record a CARC of -0.46% and remain at US$1.5 billion by 2015. Over the next five years the country's defense expenditure is expected to be driven by factors such as post war rehabilitation, a tense relationship with India and a persistent threat from separatists.

During the review period, the country allocated an average of 3.3% of GDP (gross domestic product) to defense expenditure. However, as a percentage of GDP the country's military spending is projected to decline to an average of 2.1% during the forecast period, largely due to the country's economic growth outpacing defense expenditure growth over the next five years.

The majority of the Sri Lankan defense budget is allocated to revenue expenditure, due to the country's large troop size. During the review period, the country allocated an average of 86% of its total defense budget to revenue expenses, while an average of 14% of the defense budget was spent on the procurement and modernization of equipment. With the country planning to increase troop size, the share of revenue expenditure in the overall defense budget is expected to increase to an average of 95% during the forecast period. Although the country is not expected to embark on a defense modernization strategy, market opportunities will exist for air defense systems as Sri Lanka aims to enhance its air defense capabilities.

The country's homeland security expenditure is estimated to be US$0.4 billion in 2011. Anticipated to record a CARC of -0.17% during the forecast period, the nation's homeland security expenditure is expected to be driven by internal security threats.

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