
Description: This report offers insights into market opportunities and entry strategies adopted by foreign OEMs to gain a market share in Saudi Arabia. In particular, it offers in-depth analysis of the following:

- Market opportunity and attractiveness: Detailed analysis of the current market size and growth expectations during 2011–2016, including highlights of the key drivers, to aid understanding of the growth dynamics. It also benchmarks the sector against key global markets and provides detailed understanding of emerging opportunities in specific areas.

- Procurement dynamics: Trend analysis of imports and exports, along with their implications and impact on the Saudi Arabian defense industry.

- Industry structure: Five forces analysis to identify various power centers in the Saudi Arabian industry and how these are likely to develop in the future.

- Market entry strategy: Analysis of possible ways to enter the market, along with knowledge of how existing companies have entered the market, including key contracts, alliances, and strategic initiatives.

- Competitive landscape and strategic insights: Analysis of the competitive landscape of defense manufacturers in Saudi Arabia. It provides an overview of the key defense companies (both domestic and foreign) along 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 Saudi Arabian defense industry
- A breakdown of the Saudi Arabian defense industry by spend pattern valued from 2005 through 2010 and forecasted from 2011 through 2016
- A breakdown of the markets by segment valued from 2005 through 2010 and forecasted from 2011 through 2016
- Details of top companies active across the Saudi Arabian defense industry
- Emerging trends and opportunities in the Saudi Arabian defense industry in the last 12 months

Scope:

- Analysis of defense industry market size from 2005 through 2010 and forecasts till 2016
- 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 Saudi Arabian defense industry with current, historic and forecast market values
- Gain insight into market opportunity and attractiveness
- Gain insight into industry procurement dynamics
- Gain insight into industry structure
- Gain insight into the regulations governing the Saudi Arabian defense industry and the potential market entry strategies with an expert analysis of the competitive structure
- Identify top companies of the Saudi Arabian defense industry along with profiles of all those companies

Key Highlights

- The Saudi Arabian defense industry valued US$48 billion in 2011 and is one of the largest defense markets globally. During the review period, the country's defense expenditure grew at a CAGR of 7.83%, and is expected to record a CAGR of 5.44% over the forecast period, to value US$62.4 billion by 2016. The key drivers of such expenditure growth include increases in cross-border insurgency, domestic unease with the ruling regime, the rising number of Al Qaeda training camps in the country, an increasing focus on infrastructure security regarding oil and a regional rivalry with Iran to emerge as the most influential nation in the Middle East. Saudi Arabia's substantial defense budget, coupled with the limited capabilities of domestic defense firms, is attracting foreign OEMs into the market.

Contents:

1 Introduction
   1.1 What is this Report About?
   1.2 Definitions
   1.3 Summary Methodology
   1.4 ICD Research Terrorism Index
   1.5 About ICD Research
   1.6 About Strategic Defense Intelligence

2 Executive Summary

3 Market Attractiveness and Emerging Opportunities
   3.1 Defense Market Size Historical and Forecast
   3.1.1 Defense expenditure to grow at a CAGR of XX% over the forecast period
   3.1.2 Strained relationship with Iran, high spending power and a lack of skilled personnel set to be key drivers of defense expenditure
   3.2 Analysis of Defense Budget Allocation
   3.2.1 Large spend on training of personnel set to continue
   3.2.2 Per capita defense expenditure expected to increase over the forecast period
   3.3 Homeland Security Market Size and Forecast
   3.3.1 Saudi Arabia emerges as the largest homeland security market in the Middle East
   3.3.2 Security threats will be the key driver of homeland security
   3.4 Benchmarking with Key Global Markets
   3.4.1 Saudi Arabia to become seventh-largest defense spender in the world by 2016
   3.4.2 Saudi Arabia allocated XX% of its GDP for defense procurement in 2011, the largest amongst the leading military spenders
   3.4.3 Saudi Arabia faces moderate risk of terror attacks
   3.5 Market Opportunities: Key Trends and Drivers
   3.5.1 Demand for missile defense systems to increase
   3.5.2 Demand for helicopters, infantry-fighting vehicles and tanks to increase
   3.5.3 Naval infrastructure modernization to drive demand for maritime weaponry
   3.5.4 Demand for UAVs for surveillance and monitoring activities will increase
   3.5.5 Fighter aircraft are one of the key focus areas for the Saudi air force
   3.5.6 Threats to border security and critical infrastructure to create demand for monitoring and communication systems

4 Defense Procurement Market Dynamics
   4.1 Import Market Dynamics
   4.1.1 Defense industry heavily relies on imports from foreign countries
   4.1.2 The UK and the US are the key defense suppliers to Saudi Arabia
   4.1.3 Aircraft and missiles constitute the majority of Saudi Arabia's defense imports
   4.2 Export Market Dynamics
   4.2.1 Saudi Arabia's defense export market is negligible

5 Industry Dynamics
   5.1 Five Forces Analysis
   5.1.1 Bargaining power of supplier: medium
   5.1.2 Bargaining power of buyer: medium to high
5.1.3 Barrier to entry: low to medium
5.1.4 Intensity of rivalry: high
5.1.5 Threat of substitution: high

6 Market Entry Strategy
6.1 Market Regulation
6.1.1 Defense industry remains closed to FDI
6.1.2 Government encourages offsets to overcome its shortcomings in the defense industry
6.2 Market Entry Route
6.2.1 Foreign OEMs seek to gain due to underdeveloped indigenous defense capabilities
6.2.2 A large number of foreign corporations enter the defense market by winning contracts
6.3 Key Challenges
6.3.1 Lack of investment opportunities
6.3.2 Political underpinnings, bribery, corruption and political affiliations

7 Competitive Landscape and Strategic Insights
7.1 Competitive Landscape Overview
7.1.1 Saudi Arabian defense sector is dominated by foreign competitors
7.1.2 Domestic participation in the Saudi Arabian defense industry limited to only two companies
7.2 Key Foreign Companies
7.2.1 BAE Systems Plc: overview
7.2.2 BAE Systems Plc: products and services
7.2.3 BAE Systems Plc: recent announcements and strategic initiatives
7.2.4 BAE Systems Plc: alliances
7.2.5 BAE Systems Plc: recent contract wins
7.2.6 BAE Systems Plc: financial analysis
7.2.7 EADS N.V.: overview
7.2.8 EADS N.V.: products and services
7.2.9 EADS N.V.: recent announcements and strategic initiatives
7.2.10 EADS N.V.: alliances
7.2.11 EADS N.V.: recent contracts wins
7.2.12 EADS N.V.: financial analysis
7.2.13 General Dynamics Corporation: overview
7.2.14 General Dynamics Corporation: products and services
7.2.15 General Dynamics Corporation: recent announcements and strategic initiatives
7.2.16 General Dynamics Corporation: alliances
7.2.17 General Dynamics Corporation: recent contract wins
7.2.18 General Dynamics Corporation: financial analysis
7.2.19 Lockheed Martin: overview
7.2.20 Lockheed Martin: products and services
7.2.21 Lockheed Martin: recent announcements and strategic initiatives
7.2.22 Lockheed Martin: alliances
7.2.23 Lockheed Martin: recent contract wins
7.2.24 Lockheed Martin: financial analysis
7.2.25 Science Applications International Corporation: overview
7.2.26 Science Applications International Corporation: products and services
7.2.27 Science Applications International Corporation: recent announcements and strategic initiatives
7.2.28 Science Applications International Corporation: alliances
7.2.29 Science Applications International Corporation: recent contract wins
7.2.30 Science Applications International Corporation: financial analysis
7.2.31 Sikorsky Aircraft Corporation: overview
7.2.32 Sikorsky Aircraft Corporation: products and services
7.2.33 Sikorsky Aircraft Corporation: recent announcements and strategic initiatives
7.2.34 Sikorsky Aircraft Corporation: alliances
7.2.35 Sikorsky Aircraft Corporation: recent contract wins
7.2.36 Sikorsky Aircraft Corporation: financial analysis
7.2.37 Thales: overview
7.2.38 Thales: products and services
7.2.39 Thales: recent announcements and strategic initiatives
7.2.40 Thales: alliances
7.2.41 Thales: recent contract wins
7.2.42 Thales: financial analysis
7.2.43 Boeing: overview
7.2.44 Boeing: products and services
7.2.45 Boeing: recent announcements and strategic initiatives
7.2.46 Boeing: alliances
7.2.47 Boeing: recent contract wins
7.2.48 Boeing: financial analysis
7.2.49 Northrop Grumman Corporation: overview
7.2.50 Northrop Grumman Corporation: products and services
7.2.51 Northrop Grumman Corporation: recent announcements and strategic initiatives
7.2.52 Northrop Grumman Corporation: alliances
7.2.53 Northrop Grumman Corporation: recent contract wins
7.2.54 Northrop Grumman Corporation: financial analysis
7.2.55 Rolls Royce: overview
7.2.56 Rolls Royce: products and services
7.2.57 Rolls Royce: recent announcements and strategic initiatives
7.2.58 Rolls Royce: alliances
7.2.59 Rolls Royce: recent contract wins
7.2.60 Rolls Royce: financial analysis
7.3 Key Domestic Companies
7.3.1 Advanced Electronics Company: overview
7.3.2 Advanced Electronics Company: products and services
7.3.3 Advanced Electronics Company: recent announcements and strategic initiatives
7.3.4 Advanced Electronics Company: alliances
7.3.5 Advanced Electronics Company: recent contract wins
7.3.6 Advanced Electronics Company: financial analysis
7.3.7 Al Salam Aircraft Company: overview
7.3.8 Al Salam Aircraft Company: products and services
7.3.9 Al Salam Aircraft Company: recent announcements and strategic initiatives
7.3.10 Al Salam Aircraft Company: alliances
7.3.11 Al Salam Aircraft Company: recent contract wins
7.3.12 Al Salam Aircraft Company: financial analysis

8 Business Environment and Country Risk
8.1 Business Confidence
8.1.1 Business Confidence Index
8.1.2 Market Capitalization Trend – Saudi Stock Exchange, Saudi Arabia
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 – Agriculture Output Value at Current Prices (Local Currency)
8.2.7 Agriculture – Agriculture Output Value at Current Prices (US dollar)
8.2.8 Agriculture – Agriculture 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-Current Prices as Percentage of GDP
8.2.12 Manufacturing – Mining, Manufacturing, and Utilities at Current Prices (Local Currency)
8.2.13 Manufacturing – Mining, Manufacturing, Utilities at Current Prices (US dollars)
8.2.14 Manufacturing – Mining, Manufacturing, Utilities at Current Prices, as Percentage of GDP
8.2.15 Construction – Construction Output at Current Prices, (Local Currency)
8.2.16 Construction – Construction Output-Current Prices
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 Exports as a Percentage of GDP
8.2.23 Imports as a Percentage of GDP
8.2.24 Exports Growth
8.2.25 Imports Growth
8.2.26 External Debt as Percentage of GDP
8.2.27 Exchange Rate US$–SAR (Annual Average)
8.2.28 Exchange Rate US$–SAR (End of fiscal year)
8.2.29 Debt Service Ratio
8.3 Infrastructure Quality and Availability
8.3.1 Transport – Highways and Railways
8.3.2 Transport – Automotive Components Export Trend
8.3.3 Transport – Automotive Product Imports Trend
8.3.4 Utilities – Total Installed Capacity for Electricity Generation
8.3.5 Utilities – Installed Capacity for Conventional Thermal Electricity Generation
8.3.6 Utilities – Electricity Production
8.3.7 Utilities – Electric Power Consumption
8.3.8 Healthcare – Healthcare Expenditure
8.3.9 Healthcare – Healthcare Expenditure as percentage of GDP
8.3.10 Healthcare – Healthcare Expenditure Per Capita
8.3.11 Communication – Total Internet Subscribers
8.3.12 Communication – Broadband Internet Subscribers
8.3.13 Communication – Personal Computer penetration
8.3.14 Communication – Mobile Phone Penetration Rate
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 Annual Per Capita Consumer Expenditure on Food
8.5.5 Urban and Rural Population
8.5.6 Females as Percentage of Population
8.5.7 Male as Percentage of Population
8.5.8 Mean Age of Population
8.5.9 Median Age of Population
8.5.10 Population Density
8.5.11 Age Distribution – Total Population
8.5.12 Age Distribution-Male Population
8.5.13 Age Distribution-Female Population
8.5.14 Number of Households
8.6 Political and Social Risk
8.6.1 Political Stability
8.6.2 Terrorism Index
8.6.3 Transparency Index

9 Appendix
9.1 Contact Us
9.2 About ICD Research
9.3 Disclaimer

Ordering:
Order Online - http://www.researchandmarkets.com/reports/2010978/
Order by Fax - using the form below
Order by Post - print the order form below and send to

Research and Markets,
Guinness Centre,
Taylors Lane,
Dublin 8,
Ireland.
Fax Order Form
To place an order via fax simply print this form, fill in the information below and fax the completed form to 646-607-1907 (from USA) or +353-1-481-1716 (from Rest of World). If you have any questions please visit http://www.researchandmarkets.com/contact/

Order Information
Please verify that the product information is correct and select the format(s) you require.

<table>
<thead>
<tr>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Web Address:</td>
<td><a href="http://www.researchandmarkets.com/reports/2010978/">http://www.researchandmarkets.com/reports/2010978/</a></td>
</tr>
<tr>
<td>Office Code:</td>
<td>SCD2205D</td>
</tr>
</tbody>
</table>

Product Formats
Please select the product formats and quantity you require:

<table>
<thead>
<tr>
<th>Format</th>
<th>Quantity</th>
<th>Price</th>
</tr>
</thead>
<tbody>
<tr>
<td>Electronic (PDF) - Single User</td>
<td>☐</td>
<td>USD 1250</td>
</tr>
<tr>
<td>Electronic (PDF) - Site License</td>
<td>☐</td>
<td>USD 2500</td>
</tr>
<tr>
<td>Electronic (PDF) - Enterprisewide</td>
<td>☐</td>
<td>USD 3750</td>
</tr>
</tbody>
</table>

Contact Information
Please enter all the information below in BLOCK CAPITALS

<table>
<thead>
<tr>
<th>Title:</th>
<th>Mr ☐ Mrs ☐ Dr ☐ Miss ☐ Ms ☐ Prof ☐</th>
</tr>
</thead>
<tbody>
<tr>
<td>First Name:</td>
<td></td>
</tr>
<tr>
<td>Last Name:</td>
<td></td>
</tr>
<tr>
<td>Email Address: *</td>
<td></td>
</tr>
<tr>
<td>Job Title:</td>
<td></td>
</tr>
<tr>
<td>Organisation:</td>
<td></td>
</tr>
<tr>
<td>Address:</td>
<td></td>
</tr>
<tr>
<td>City:</td>
<td></td>
</tr>
<tr>
<td>Postal / Zip Code:</td>
<td></td>
</tr>
<tr>
<td>Country:</td>
<td></td>
</tr>
<tr>
<td>Phone Number:</td>
<td></td>
</tr>
<tr>
<td>Fax Number:</td>
<td></td>
</tr>
</tbody>
</table>

* Please refrain from using free email accounts when ordering (e.g. Yahoo, Hotmail, AOL)
Payment Information

Please indicate the payment method you would like to use by selecting the appropriate box.

☐ Pay by credit card: You will receive an email with a link to a secure webpage to enter your credit card details.

☐ Pay by check: Please post the check, accompanied by this form, to:
Research and Markets,
Guinness Center,
Taylors Lane,
Dublin 8,
Ireland.

☐ Pay by wire transfer: Please transfer funds to:
Account number 833 130 83
Sort code 98-53-30
Swift code ULSBIE2D
IBAN number IE78ULSB98533083313083
Bank Address Ulster Bank,
27-35 Main Street,
Blackrock,
Co. Dublin,
Ireland.

If you have a Marketing Code please enter it below:

Marketing Code: _______________________

Please note that by ordering from Research and Markets you are agreeing to our Terms and Conditions at http://www.researchandmarkets.com/info/terms.asp

Please fax this form to:
(646) 607-1907 or (646) 964-6609 - From USA
+353-1-481-1716 or +353-1-653-1571 - From Rest of World