The Portuguese Defense Industry: Market Opportunities and Entry Strategies, Analyses and Forecasts to 2016

Description: This report is the result of ICD's extensive market and company research covering the Portuguese defense industry. It provides detailed analysis of both historic and forecast defense industry values including key growth stimulators, analysis of the leading companies in the industry, and key news.

Why was the report written?

The Portuguese Defense Industry Market Opportunities and Entry Strategies, Analyses and Forecasts to 2016 offers the reader insights into the market opportunities and entry strategies adopted by foreign original equipment manufacturers (OEMs) to gain market share in the Portuguese defense industry.

What is the current market landscape and what is changing?

The primary factors driving Portugal's defense expenditure are military modernization initiatives set out in the country's military procurement program (LPM) and Portugal's commitment to international organizations such as NATO, the OECD, the EU and the UN. The majority of the defense budget is used for personnel expenses including the pensions and salaries of the armed personnel. The expenditure for equipment procurement, which averaged 17.51% of the total defense budget during the review period, is expected to fall to 14.46% by 2013 with the country's 40% reduction in the budget of the LPM.

What are the key drivers behind recent market changes?

By 2016, Portugal is expected to invest in the modernization and acquisition of its advanced defense systems in the areas of Army, Navy and Air Force related defense capabilities such as aircrafts, armoured vehicles, patrol vessels and frigates. These are the fundamental drivers in the Portuguese defense market.

What makes this report unique and essential to read?

The Portuguese Defense Industry Market Opportunities and Entry Strategies, Analyses and Forecasts to 2016 provides detailed analysis of the current industry size and growth expectations from 2011 to 2016, including highlights of key growth stimulators. It also benchmarks the industry against key global markets and provides detailed understanding of emerging opportunities in specific areas.

Scope

The report provides detailed analysis of the current industry size and growth expectations from 2011 to 2016, including highlights of key growth stimulators. It also benchmarks the industry against key global markets and provides detailed understanding of emerging opportunities in specific areas.

The report includes trend analysis of imports and exports, together with its implications and impact on the Portuguese defense industry.

The report covers five forces analysis to identify various power centers in the industry and how these are expected to develop in the future.

The report allows readers to identify possible ways to enter the market, together with detailed descriptions of how existing companies have entered the market, including key contracts, alliances and strategic initiatives.

The report helps the reader to understand the competitive landscape of the defense industry in Portugal. 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.

Reasons To Buy
The report looks at historical performance as well as future industry projections using the in-house model. The report is a mixture of graphs, charts, tables and text in an effort to give the reader the maximum possible information in the most efficient and visually appealing manner.

The report helps marketing agencies in the industry to promote their business by aligning their capabilities and business practices with their customers' changing needs, while it also helps suppliers to benchmark their efforts with those of their competitors.

Key Highlights

The country's defense exports, which declined in 2011, are expected to increase in the forecast period due to the country's various maintenance and ship and aircraft component supply contracts. Portugal's membership of the consortiums involved with the production of the NH90 helicopter and KC-390 transport aircraft will also increase the country's defense exports.

Foreign defense companies that wish to enter the Portuguese defense industry can do so by making technology transfers to Portuguese defense companies. An OEM can also sub-contract work such as MRO services to Portuguese businesses, or establish a long-term supply contract for certain components.

Portugal's homeland security expenditure falls under the budget of the Ministry of Internal Administration (MIA). The homeland security budget stood at US$2.54 billion in 2011, registering a CAGR of 2.06% during the review period. During the forecast period the homeland security budget is expected to grow at a CAGR of 7.83% to reach US$1.29 billion by 2016.

The army is expected to procure armored vehicles and battle tanks, and to upgrade its fleet of M113 armored vehicles. The army has also been acquiring Pandur 2 armored vehicles, the contract for which was signed in 2005.

The Portuguese government is expected to spend significantly on command, control and communication systems for the air force and navy. The government, through its LPM, has allocated substantial resources for the acquisition of these capabilities, which will allow its armed forces to integrate with other NATO forces to ensure interoperability.

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